



**PUBLIC COMMENT DRAFT**

**2024-2027**

# Metropolitan Transportation Improvement Program (MTIP)

April 2023



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The Joint Policy Advisory Committee on Transportation (JPACT) is a 17-member committee that provides a forum for elected officials and representatives of agencies involved in transportation to evaluate transportation needs in the region and to make recommendations to the Metro Council. The established decision-making process assures a well-balanced regional transportation system and involves local elected officials directly in decisions that help the Metro Council develop regional transportation policies, including allocating transportation funds. JPACT serves as the MPO board for the region in a unique partnership that requires joint action with the Metro Council on all MPO decisions.

**Project web site:** [oregonmetro.gov/mtip](http://oregonmetro.gov/mtip)

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## CHAPTER 1:

### WHAT IS THE MTIP?

#### What is the Metropolitan Transportation Improvement Program?

The Metropolitan Transportation Improvement Program (MTIP) is a multipurpose, federally required document. The MTIP demonstrates how planned transportation projects advance the Portland metropolitan region's shared goals and comply with federal regulations – such as fiscal constraint, air quality impacts, and public involvement. Additionally, the MTIP outlines the implementation schedule of federally funded transportation projects in the region for the next four years and helps to manage the project delivery of transportation projects.

The MTIP exists as a financial planning and project delivery tool for the metropolitan region. As a tool, the MTIP assists in ensuring the region does not overspend and tracks the delivery of transportation projects. As a document, the MTIP shows how the investments into the transportation system make progress towards the goals for the system.

Adopted in December 2018, the region agreed to eleven shared goals for the transportation system. Of the eleven, the region prioritized four goals:

- **Safety** – People's lives are saved, crashes are avoided and people and goods are safe and secure when traveling in the region.
- **Equity** – The transportation-related disparities and barriers experienced by historically marginalized communities, particularly communities of color, are eliminated.
- **Climate leadership** – The health and prosperity of people living in the greater Portland region are improved and the impacts of climate change are minimized as a result of reducing transportation-related greenhouse gas emissions.
- **Mobility** – The transportation system is managed and optimized to ease congestion, and people and businesses are able to safely, reliably and efficiently reach their destinations by a variety of travel options.

## Federal regulatory context

The Federal-Aid Highway Act of 1962 established metropolitan planning organizations (MPOs), like Metro, to ensure regional cooperation in transportation based on a continuing, cooperative, and comprehensive (“3C”) planning process. MPOs conduct long-range planning and fund programming for the regional transportation system. For Metro, that means developing and implementing two planning and policy documents: the Regional Transportation Plan (RTP) and the Metropolitan Transportation Improvement Program (MTIP). The RTP serves as the long-range transportation vision and policy document. It outlines the vision for the region’s urban transportation system, establishes goals and policies to facilitate achieving those goals, and sets a baseline of priority investments. The MTIP, as the RTP’s companion, is the vehicle to implement the RTP by providing a snapshot of where federal transportation funds are anticipated to be spent over the first four federal fiscal years of the RTP.

### What is an MPO?

A metropolitan planning organization is a federally mandated and federally funded transportation policy-making organization for urbanized areas with a population greater than 50,000. Made up of representatives from local government and governmental transportation authorities, MPOs ensure regional cooperation in transportation based on a continuing, cooperative, and comprehensive (“3C”) planning process. Federal funding for transportation projects and programs are channeled through this planning process.

As the metropolitan planning organization for the Portland metropolitan area, Metro is authorized by Congress and the State of Oregon to coordinate and plan investments in the transportation system for Clackamas, Multnomah and Washington counties.

Per federal requirements, planning and policy documents are "constrained to reasonably expected revenue." This means Metro, working with partner agencies, makes long-term (for the RTP) and short-term (for the MTIP) projections of transportation revenue secured and/or expected to come to the region from federal and significant state, regional, or local sources. The projected revenues set the anticipated capacity of the region to make long and short-term transportation investments without over-expending or becoming unconstrained. These revenue projections are updated with each RTP and each MTIP cycle.

## Who plays a role in the MTIP?

The development and continual maintenance of the MTIP is a joint effort between regional and state partners. Metro acts as the main author and administrator of the MTIP and works closely with the Oregon Department of Transportation (ODOT) and transit agencies, Tri-County Metropolitan Transportation District (TriMet), and South Metro Area Regional Transit (SMART) to reflect the transportation investments in the Portland region. Metro, ODOT, TriMet, and SMART each have authority over expending federal transportation dollars in the Portland metropolitan region. For example, as public transit agencies TriMet and SMART utilize funding from the Federal Transit Administration (FTA) to support capital and maintenance programs to deliver services. Metro, ODOT, TriMet, and SMART are each responsible for providing details of transportation expenditures from year-to-year. These agencies must also demonstrate how the total combination of transportation expenditures advance federal, state, and regional priorities.





## CHAPTER 2: OVERVIEW OF THE 2024-2027 MTIP

### 2024-2027 MTIP investment program overview

The 2024-2027 MTIP is a little over \$1.3 billion in transportation project and program investments. Spread over 130 projects and programs, the 2024-2027 MTIP includes:

- A majority of maintenance and preservation investments to take care of the transportation infrastructure already in place,
- a small number of capital investments to enhance and fill gaps on the transportation system across all forms of travel,
- operations investments to guide travelers and use technologies to make the system run smoother and safer, and
- programs that educate about travel options, support kids in walking and rolling to school safely, and reinforcing the connection between housing and transit.

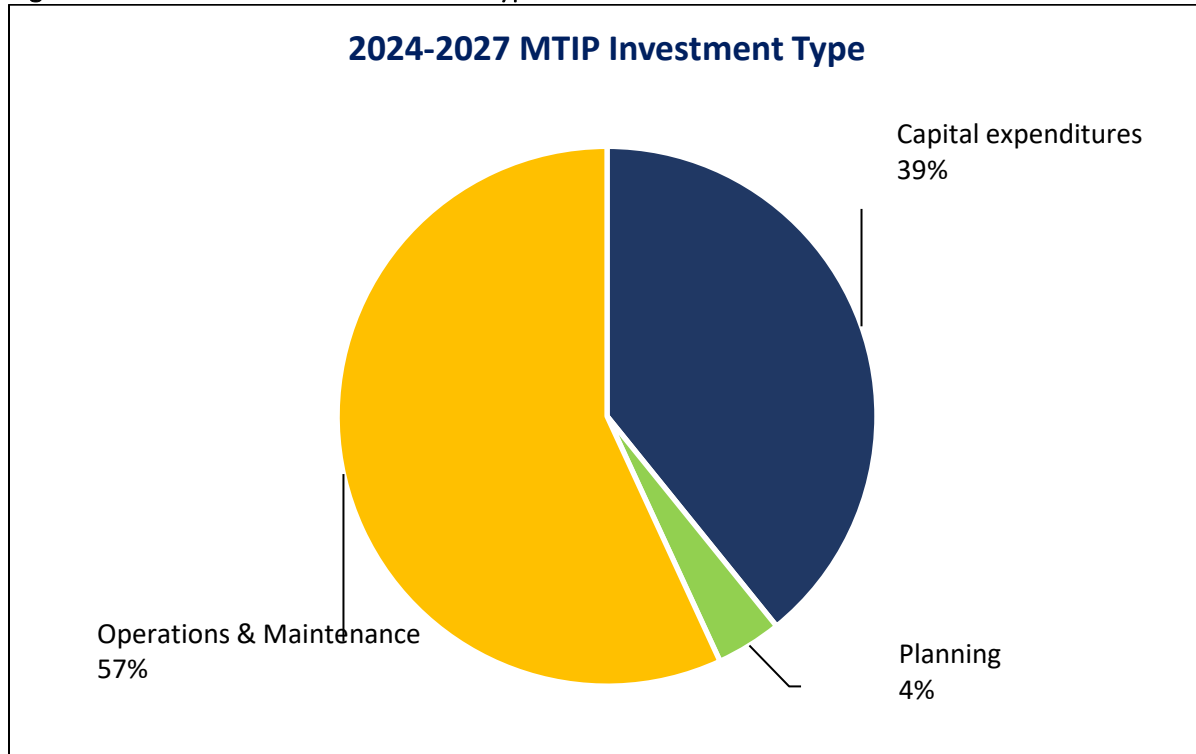
#### Chapter sections

- 2024-2027 MTIP investment program overview
- What changed from the 2021-2024 MTIP to the 2024-2027 MTIP?
- Major areas to influence the 2024-2027 MTIP
- What major projects were delivered from the 2021-2024 MTIP and general implementation progress?
- What project delays occurred from the 2021-2024 MTIP?
- Investment highlights of the 2024-2027 MTIP

## Taking care of the roads versus building new facilities (maintenance vs. capital investment)

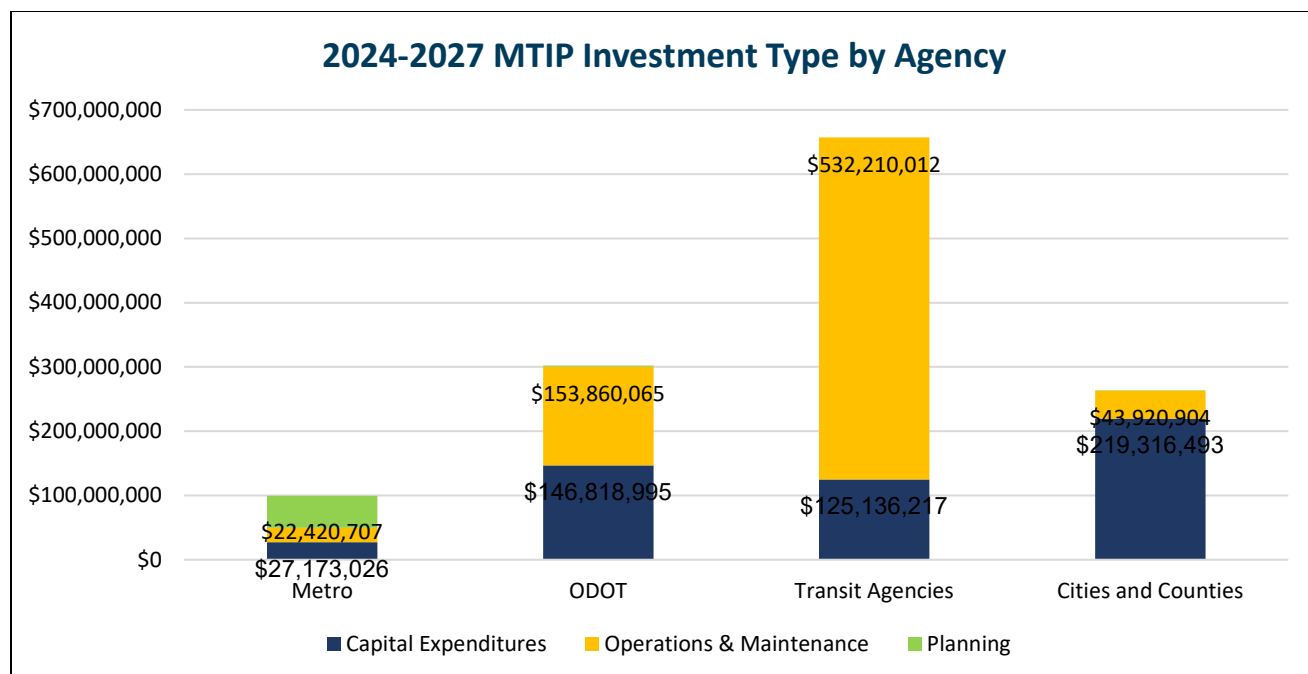
Approximately 39 percent of the transportation investments in the 2024-2027 MTIP represent capital investments and 57 percent represented maintenance, preservation, and operations investments. The remaining 4 percent of the 2024-2027 MTIP represent planning activities.

Figure 2-1. 2024-2027 MTIP Investment Type



The MTIP is a snapshot of the region’s transportation investments. The investment profile changes frequently throughout its development and the three years it is effective. The split between the capital investments (39%) and the maintenance, preservation, and operations investments (57%) demonstrates the region has emphasized preserving and gaining efficiencies from the existing transportation system. The split also highlights the challenge of balancing different goals and objectives while also implementing policy direction coming from different places – from federal directives, state legislative mandates, or local policies. At times, the different sources of policy direction to focus on certain goals and objectives for the transportation system compete against each other or also create MTIP cycles where the investment profile tilts in a particular direction. For example, the 2024-2027 MTIP cycle has emphasized the “fix it first” regional and statewide policy direction. Limitations on funding sources such as legislative directed spending on specific projects can also tilt the MTIP investment profile in particular directions over different funding cycles.

Figure 2-2. 2024-2027 MTIP Investment Type by Agency



*Note: Metro's capital investments include the Columbia Boulevard Overcrossing project being delivered by Metro's Parks and Nature Department and the Transit-Oriented Development program.*

### Definitions of Capital, Maintenance and Preservation, and Operations

In the public works universe, a capital investment is the planning and construction of new infrastructure such as roads, bridges, water and sewer systems, and other structures. The new infrastructure may fill in gaps in a system, such as building missing sidewalks on a busy street to create a contiguous walking environment.

Operations refers to managing activities and behavior on the existing transportation system through the use of technology and communications systems. Operations projects typically include new and/or synchronized traffic signals, actively monitoring and dispatching tow trucks and emergency response to crash sites, variable message and speed signs on the freeway, and transit or bicycle signal priority at intersections, installation of fiber optic cable communications, and marked crosswalks with on-demand flashing lights. For transit, operations also include the significant investment associated with running the transit vehicles.

A maintenance and preservation investment is the work to repair or rebuild an existing piece of infrastructure. The infrastructure may be decaying or at a certain age when it needs replacement. Common maintenance investments are repaving streets, fixing the joints on bridge spans, replacing signs and light fixtures, or restriping a faded bicycle lane.

The region's main project delivery agencies show varying level of investment towards capital and maintenance. For example, the transit agencies – SMART and TriMet – may show the largest amount of investment in the MTIP, but the majority of its federal funding is primarily for maintaining the assets (e.g. buses, light rail track work, etc.) of the transit system. As with any funding source, federal funds have several restrictions. Some dollars are restricted solely for the purpose of maintaining roadways or purchasing buses, whereas others have greater flexibility. However, several federal highway transportation discretionary funds tend to focus on capital investments such as roads, transit, bicycle and pedestrian networks, which are short-term commitments. The expectation by the federal government is for states, local governments, and transit agencies to maintain and operate the system. Nonetheless, there are federal sources of monies for maintenance and preservation, as represented in the 2024-2027 MTIP, but the bulk of revenue for maintenance programs and operating the transit system is typically raised by state and local governments. The MTIP does not program and report on all local revenues generated and used for these purposes, only those used to provide additional funds on federally funded projects.

### **Wait, don't I pay for the potholes to get fixed on my street?**

The Metropolitan Transportation Improvement Program does not include all the scheduled funding for maintenance activities in the Portland metropolitan region in the upcoming four fiscal years. The MTIP only includes those maintenance activities/programs that receive federal funds. The bulk of maintenance funding is generated through local and state sources, like local gas taxes. Since the MTIP is not required to include the majority of locally funded capital or maintenance projects, it only shows a portion of the overall funding that goes towards maintaining the transportation system. The maintenance activities that MTIP is able to illustrate are those undertaken by ODOT, SMART, and TriMet because these agencies receive and administer federal transportation funds. Still, the MTIP is only showing a partial picture of the overall resources each of these agencies dedicates to maintenance.



**FIXING  
OUR  
STREETS**  
YOUR DIME AT WORK

**10 CENTS AT THE PUMP  
= \$75M FOR:**

- PAVING AND  
POTHOLE REPAIR**
- SAFE ROUTES TO SCHOOL**
- MORE SIDEWALKS**
- NEW TRAFFIC SIGNALS  
AND STREETLIGHTS**
- BETTER BIKE LANES**

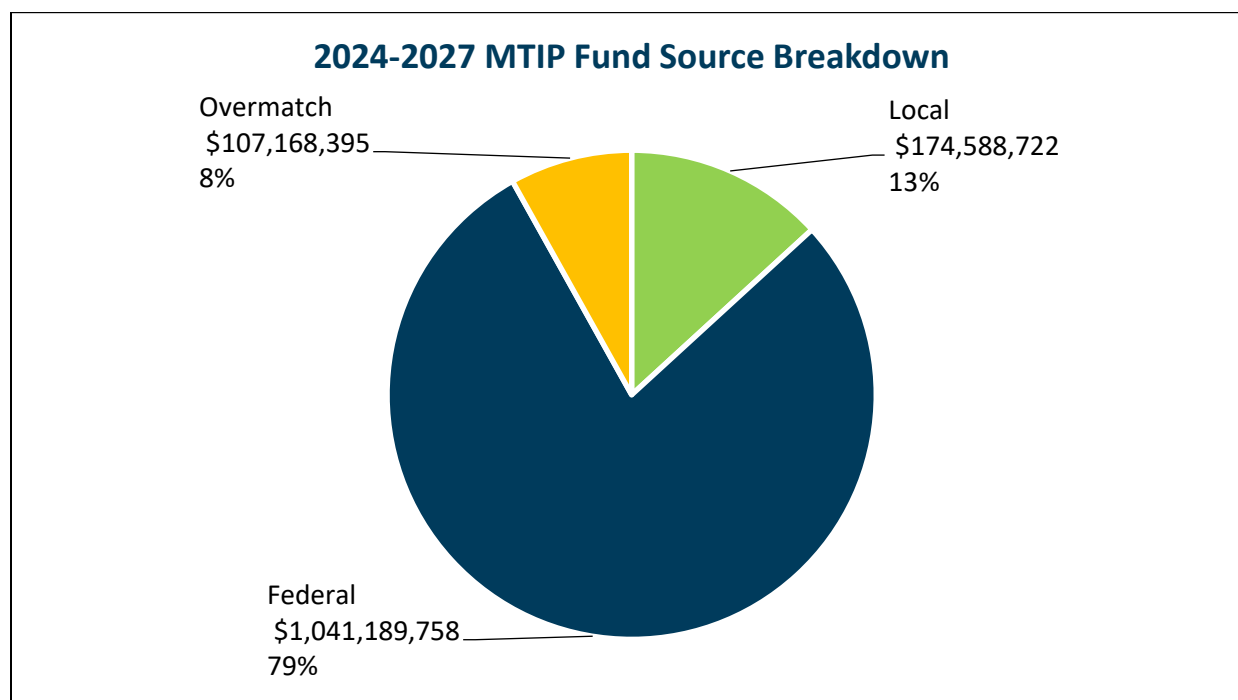
*The City of Portland's Fix Our Streets is an example of local revenue program to address roadway maintenance.*



## 2024-2027 MTIP investment portfolio

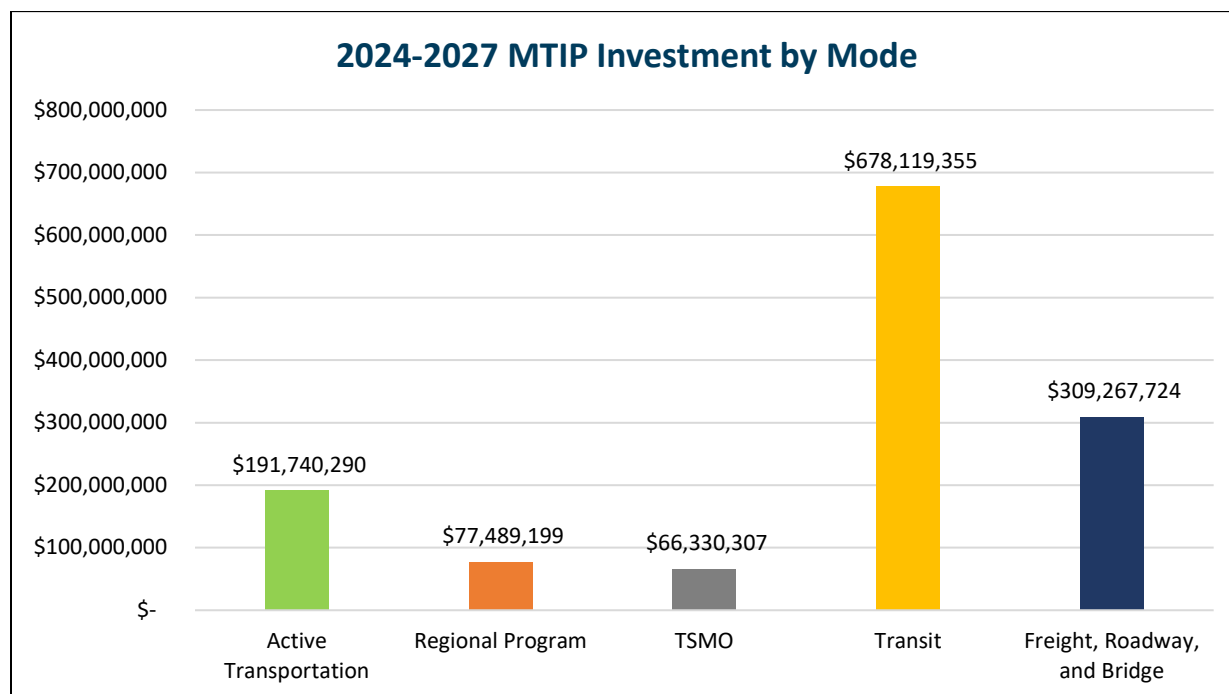
In addition to being an investment snapshot in time, the 2024-2027 MTIP primarily functions as the investment program for federal funds and regionally significant projects and programs. The 2024-2027 MTIP is comprised of 78 percent of federal funding with the remaining 22 percent is local funding. Of the local funding just over 8 percent is overmatch, meaning it is beyond the minimum required local dollars by the federal government. The region is contributing over \$281 million in local and state dollars in the upcoming four years towards the federally supported projects and programs. The increased contribution beyond what is necessary shows a commitment and partnership with the federal government to implement transportation projects and programs that meet shared objectives.

Figure 2-3. 2024-2027 MTIP Fund by Source



The 2024-2027 MTIP invests across all different forms of travel in the upcoming four years. While the bulk of the 2024-2027 MTIP investments – at nearly \$988 million combined – are for roadway and transit, the region is also directing over \$191 million towards building out the active transportation network. In addition, \$66 million is for transportation system management and operations (TSMO), which compliments the region’s investments into the roadway and transit systems to monitor, analyze and help the system operate more efficiently and safely. The TSMO investments use a mix technologies and communications infrastructure to help manage the traffic flow of roadways, provide traveler information, or provide priority to buses, light rail, and even bicyclists to get through intersections.

Figure 2-4. 2024-2027 MTIP Investment by Mode



While roadway and transit investments may dominate the 2024-2027 MTIP, it is important to remember the investments represent a mix of maintenance and capital projects, where the active transportation investments are primarily to upgrade or build new facilities. Nonetheless, the active transportation investment is not as large as investments in roadways or transit, preventing the completion of a network that provides connectivity and facilitates ease of traveling by walking, bicycling, or getting to transit. Federal funds are also incredibly challenging to use for smaller scale projects like sidewalk infill on a main street, building a protected bikeway, or a multiuse path because the federal aid process can be difficult to navigate. Local jurisdictions as well as ODOT will often try to fund active transportation projects with local or state funds to avoid the federal aid process. Therefore, the investment into active transportation may not fully be represented.

### What changed from 2021-2024 MTIP to the 2024-2027 MTIP?

The 2024-2027 MTIP represents just over \$1.3 billion in combined capital and operations and maintenance investments in the regional transportation system. This is approximately \$200 million more than the 2021-2024 MTIP. The difference in the level of funding can be attributed to several events which occurred since the adoption of the 2021-2024 MTIP in July 2020. A discussion of the changing landscape and how the events influenced the 2024-2027 MTIP is below.

## Changes since the adoption of the 2021-2024 MTIP

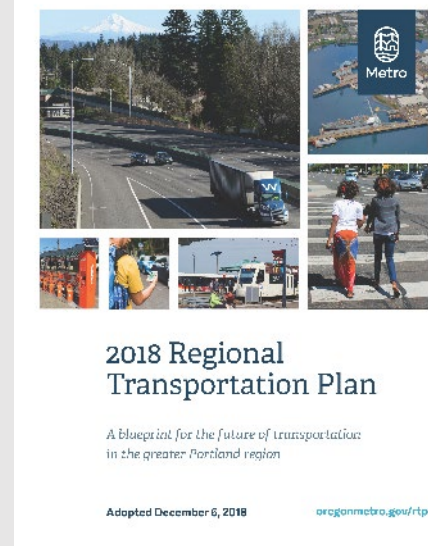
The world has changed dramatically since summer 2020, when the 2021-2024 MTIP was adopted. Even during the final months leading up to the adoption of the 2021-2024 MTIP, events around the novel coronavirus pandemic were evolving and creating greater global uncertainty. The global pandemic and several subsequent events and activities both within and outside of the transportation sector directly and indirectly influenced and shaped the development of the 2024-2027 MTIP. These include:

### Non-Transportation Sector Events

- The novel coronavirus, first witnessed in late 2019 in Wuhan, China, resulted in a global pandemic. Disrupting every aspect of daily life in effort to reduce the spread of the airborne respiratory virus, travel patterns and transportation needs changed for some while also highlighting the vast inequities.
- Extreme weather events in the Portland region, including the heat dome event in June 2021, the ice storm event in February 2022, the bomb cyclone event in December 2022, and the unanticipated heavy snowfall event in February 2023 placed into the forefront of the public's mind living through the impacts of climate change and the role the transportation system plays in contributing to the current climate crisis.
- The death of George Floyd in May 2020 sparked on-going racial justice protests which highlighted to the nation the significant marginalization and inequities faced by non-white communities – particularly Black/African Americans and spurred discussion and actions to rectify the differences.
- The country saw the greatest increase in inflation in the costs of goods and services in over two decades. Issues related to the global supply chain and downstream effects from the coronavirus pandemic continue to reverberate through the economy and transportation sector.
- Then Governor Kate Brown issuing Executive Order 20-04 in June 2020. Executive Order 20-04 directs state agencies to take actions to reduce and regulate greenhouse gas emissions.

### Transportation Sector Events

- Coronavirus related aid packages were passed by Congress and signed by the President to ease the economic impacts caused by the sudden disruption, which included funding for transportation.
  - Aid packages passed in 2020 and 2021 provided additional funding to transit agencies, metropolitan planning organizations, and state transportation departments to offset financial impacts to operating budgets.
- The Bipartisan Infrastructure Law (BIL) which included the Infrastructure Investment and Jobs Act (IIJA) passed in November 2021. The transportation reauthorization provided the largest investment in transportation infrastructure since the creation of the interstate highway system.
- Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) completed a certification review of Metro and the region's metropolitan planning activities in April 2021.
- In response to former Governor Kate Brown's Executive Order 20-04, the Oregon Department of Transportation, Oregon Department of Land Conservation and Development, Oregon Department of



*2018 Regional Transportation Plan*

Energy, and Oregon Department of Environmental Quality launched Every Mile Counts campaign. The campaign is a coordinated effort between state agencies to collaborate on actions to implement the Statewide Transportation Strategy: A 2050 Vision for Greenhouse Gas Reduction to reduce greenhouse gas (GHG) emissions from transportation and bring Oregon closer to achieving the emission reduction goals.

- DLCD also adopted the Climate Friendly Equitable Communities rules as part of state's transportation planning rule. The Climate Friendly Equitable Communities rules direct cities, counties, and local governments like metropolitan planning organizations, to update and adopt land use plans to better connect transportation and land use to ensure Oregonians have more safe, comfortable ways to get around, and don't have to drive long distances just to meet their daily needs.
- The Portland region's distributive forecast was completed in 2020, which allocated the anticipated 200,000 new households in the Portland metropolitan region over the next 20 years.
- The Interstate Bridge Replacement project (formerly known as the Columbia River Crossing) relaunched in 2019 with renewed efforts to begin construction in 2025.
- ODOT established the Office of Urban Mobility to manage several major capital projects in the Portland metropolitan region. Two of the projects include the next phases of pricing the transportation system on Interstate 5 and Interstate 205 to manage demand and raise revenue.
- The region, in conjunction with ODOT and transit partners, began the implementation of MAP-21 performance targets with the development of 2 and/or 4-year targets, baselines, and monitoring.
- ODOT, in coordination with the metropolitan planning organizations across the state launched an annual obligation target process.
- Metro and ODOT in partnership completed an update to the Regional Mobility Policy and the recommendations are expected to be incorporated into the 2023 RTP update and the Oregon Transportation Plan (OTP) update.
- The region's voters approved two affordable housing-related funding measures to address the shortage of affordable homes in the region and a complimentary human services measure to support services to houseless people. The affordable housing funding measure began breaking ground on capital projects.
- The Oregon Legislature passed House Bill 3055, a cleanup piece of legislation for the previously passed House Bill 2017, which implemented a statewide transportation funding package through 2027. Importantly, House Bill 3055 created a mechanism to allow for borrowing against future pricing/tolling revenues to help deliver major capital transportation projects.
- The region placed a regional transportation funding measure before voters in November 2020 election, which did not pass.

The different events and milestones all shaped the 2024-2027 MTIP in various ways. The various effects of the global also shaped the investment profile of the 2024-2027 MTIP. Regional policies continue to provide direction towards the allocation of funds and shape the investment profile. For other cases, state legislation and federal directives directed certain projects or types of projects to be included in the investment profile. The federal directives also shaped the transparency of the financial plan for the 2024-2027 MTIP. The activities explicitly – like federal directives – or implicitly – like the projected population forecast – played a role in shaping investments in the regional transportation system.

## Major areas to influence the 2024-2027 MTIP

Of the many events to occur since summer 2020, five areas significantly influenced the 2024-2027 MTIP: regional and agency policy direction, new transportation funding, recovery from the pandemic, project delivery, and impending major capital projects anticipated for the next phases of work. A short summary is provided for each of these areas to set into context the profile of investments shown in the 2024-2027 MTIP.

### Regional and agency policy direction

The 2024-2027 MTIP was developed with the directive to make further near term progress towards the 2018 RTP four priority areas for investments in the system:

- Safety – Get to zero death and serious injuries on the region’s roadways (Vision Zero)
- Equity – Reduce the disparities gap people of color, people with lower incomes, and people with limited English language skills experience with the transportation system
- Climate – Reduce greenhouse gas emissions from transportation sources and make progress towards the implementation of the region’s Climate Smart Strategy
- Mobility – Manage demand on the transportation system through a variety of strategies and tools.

The regional policy direction was taken into account for the different funding allocations processes undertaken by each MTIP partner – Metro, ODOT, SMART, and TriMet in different ways. For Metro’s 2025-2027 Regional Flexible Fund Allocation (RFFA), the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council continued the directive for the region to use the four investment objectives adopted in the RTP as the policy objectives guiding the allocation. This resulted in technical evaluation criteria focusing on the four 2018 RTP priorities. Whereas for ODOT’s 2024-2027 STIP funding allocation discussion, JPACT and the Metro Council submitted comments to the Oregon Transportation Commission (OTC) and the Region 1 Area Commission on Transportation (ACT) advocating for ODOT investment on the Portland region’s transportation priorities and the consistency of that direction with ODOT’s strategic action plan. In addition, Metro worked with the Technical Policy Alternatives Committee (TPAC) to engage with ODOT staff on individual funding programs of interest in the region and to support investments that advanced the four priorities.

While Metro’s allocation of the RFFA explicitly linked regional policy direction to the funding allocation process, the allocations undertaken by ODOT, SMART, and TriMet weighed and balanced the regional policy direction with their agency leadership direction and priorities and fund source restrictions. In areas

**Joint Policy Advisory Committee on Transportation (JPACT)** – A joint decision-making body with the Metro Council for all metropolitan planning organization activities, including the metropolitan transportation improvement program (MTIP) and regional transportation plan (RTP). Convened by Metro.

**Technical Policy Alternatives Committee** – The staff-level technical advisory committee to JPACT. Convened by Metro.

**Region 1 Area Commission on Transportation** – An advisory body convened by the Oregon Department of Transportation to advise the Oregon Transportation Commission on local transportation issues and provide recommendations. The Region 1 ACT geography encompasses the majority of the metropolitan planning area and well as rural areas in Clackamas County, Multnomah County, and Hood River County.



where agency direction and regional policy direction aligned, the link was clear and explicit in the funding. For example, the region's transit providers TriMet and SMART both have a role in the region's ability to implement the Climate Smart Strategy and reduce greenhouse gas emissions. As a result, the transit agency budget processes allocated funding towards fleet electrification that is illustrated in the 2024-2027 MTIP. The 2024-2027 MTIP reflects a balance across policy direction coming from different areas.

## **Recovery from the Pandemic**

The onset and prolonged uncertainty created by the global coronavirus pandemic greatly changed and impacted the transportation sector. Transit was devastated as ridership plummeted under the advisement to social distance. Additionally, the abrupt transition to work from home and the surprising acceptance compounded the impact to the transit system. At the same time essential workers continued to rely on the transit system to keep medical facilities open and the economy running. The Portland region's transit agencies received funding from the pandemic aid packages, while at the same time needing to respond to the changing travel behaviors and serve foundational customers. The realignment of transit service networks as well as using aid funding to address asset management needs and transitioning the bus fleet to cleaner emissions vehicles are part of the transit investments identified in the 2024-2027 MTIP.

Other parts of the transportation sector saw impacts from the pandemic which shape and influence the investments presented in the 2024-2027 MTIP. A strange outcome of the pandemic, though consistent with national trends, was the accelerated trend of crashes on the region's roadways. The Portland region had already been on an upward trajectory of crashes on the region's roadways, but the pandemic only worsened the trend. The investment into safety in the 2024-2027 MTIP reflects a response in attempting to address the infrastructure element which allow for crashes of severity to occur.

Lastly, the disparities exposed by the impacts of the pandemic and the racial justice protests to emerge in summer 2020 led to a number of funding allocation decisions to address the systematic inequities prevalent throughout society. With opportunities to emerge through new unanticipated revenues, the 2024-2027 MTIP was influenced by these events with an increased number of community-oriented projects to serve the different transportation needs of marginalized communities.

## **New Revenues and Project Delivery**

The passage of the Bipartisan Infrastructure Law (BIL) increased the amount of revenue to allocate to projects and programs. Several new funding programs created by BIL shaped avenues to support transportation projects and programs to advance the 2018 RTP priorities and are reflected in the 2024-2027 MTIP. There is an increase in active transportation projects funded and new funding from BIL to build electric vehicle infrastructure are a part of the composition of the 2024-2027 MTIP investment

### **A six-year MTIP for project delivery, but with only four-years of funding capacity**

Federal regulations allow for MTIPs to show a six-year schedule of expending federal monies to better depict realistic project delivery schedules and facilitate better management of financial constraint. Transportation projects can have extended timeframes and unexpected events may happen during project development and delivery. (Like a global pandemic.) While the 2024-2027 MTIP shows project schedules extended to fiscal year 2029, the 2024-2027 MTIP only represents the funding capacity for fiscal years 2024-2027. Transportation projects which are programmed in fiscal years 2028 and 2029 are not utilizing the funding capacity expected in those years.

profile. Additionally, revenue for many of the federal highway and transit formula programs increased the amount of federal revenue available for maintenance and preservation activities needed.

While BIL increased the streams of revenue available in the 2024-2027 MTIP cycle, another unexpected consequence of the pandemic is the rapid increase in inflation. During the pandemic supply chain systems were disrupted and strategies deployed to prevent a possible recession created a perfect storm for inflation to rise quickly. The rising inflation threw off project cost estimates established for existing projects in development as well as cost estimating for candidate projects. As a result, despite an influx of new revenues represented in the 2024-2027 MTIP, the number of projects being delivered is lesser than previous cycles.

Additionally, implemented during the 2021-2024 MTIP cycle, the six-year programming framework assists partners to develop realistic project delivery schedules, especially because of the complexities in planning and designing transportation projects in an urban environment. While each project had reasons

for its delay in delivery, the numerous project delays had cascading effects in continually financially constraining the MTIP and STIP. Prior to the implementation of the annual obligation targets, ODOT supported the region by swapping out older federal dollars on Metro allocated projects and expending those on state projects ready to go into construction. However, with the infusion of new funds and challenges in delivering its own portfolio of projects, ODOT could no longer provide an unlimited level of support in swapping out funds.

As the second MTIP cycle to employ a six-year programming framework for those projects funded through Metro's Regional Flexible Fund Allocation (RFFA), the region has successfully met its obligation targets in part due to the six-year programming framework. Metro also continues to work with jurisdictions to develop realistic implementation schedule for the delivery of capital projects, but also for running programs. The 2024-2027 MTIP extends the programming through fiscal year 2029 to better reflect the delivery schedules of projects and get a better pulse of when the upcoming four-years of funding will get expended.

### **Impending Major Capital Transportation Projects**

At the end of the 2017 legislative session, Oregon lawmakers passed a statewide transportation package known as House Bill 2017. This transportation package raised new revenues through a combination of gas tax increases, vehicle registration increases, a privilege tax on vehicles, and other mechanisms. The state transportation package also directed some of these new revenues to specific regionally significant transportation projects, including Interstate-5 Rose Quarter project, new lanes on Oregon 217, planning work towards Interstate-205 Abernathy bridge retrofit and expansion to Stafford Road, and the delivery

of congestion pricing project(s) on Interstate 5 and Interstate 205. Subsequently, House Bill 3055 was passed by the Oregon Legislature in 2021 as a clean-up bill to House Bill 2017. However, as part of House Bill 3055, Oregon lawmakers gave the state the ability to bond against future revenues generated from the implementation of congestion pricing. The bonded revenues are supporting different phases of the major roadway projects planned and designed by the Urban Mobility Office at ODOT. These major projects, while not included in the programming of the 2024-2027 MTIP at this time are reflected in the prior obligations of major projects list identified in Chapter 6 and the illustrative list of projects. These major projects will play a large role in 2024-2027 MTIP as they are anticipated to generate major MTIP amendments during the 2024-2027 MTIP timeframe.

## What major projects were delivered from the 2021-2024 MTIP and general implementation progress

From 2020 through 2023, the region's partners worked cooperatively and collaboratively on the development of the 2024-2027 MTIP. At the same time, the implementation of the 2021-2024 MTIP was in progress. Adopted in July 2020, the \$1.1 billion dollar investment program included an array of transportation projects and programs. In federal fiscal years 2021 and 2022 of the 2021-2024 MTIP, the region obligated over \$1.1 billion on 194 transportation project phases and program activities. This included approximately \$300 million of federal relief funding in 2022 related to the pandemic that was not originally anticipated or programmed in the 2021-2024 MTIP.

The 2021-2024 MTIP saw some long-planned accomplishments come to fruition. Two marquee transportation projects and programs to get implemented from the 2021-2024 MTIP include:

- the Better Red MAX extension project; and
- the Oregon 217 auxiliary lanes.

The Better Red project is an extension of the MAX red line service to Hillsboro airport and addresses critical trackway bottlenecks at the Gateway transit center and at Portland International Airport terminal. The bottleneck at the Gateway transit center impacts the operations of the entire MAX rail system and hindered the ability to extend the MAX red line. In expediting the design, the project received a Federal Transit Administration core capacity capital investment grant (CIG) and was able to implement the Better Red project right after the Division Transit Project.

The Oregon 217 (OR217) auxiliary lanes project adding auxiliary lanes, or ramp to ramp connections, between Beaverton-Hillsdale Highway and Oregon 99 West. Construction activity began in December 2021. The OR217 auxiliary lanes project is one of the earmarked projects from House Bill 2017 and was identified as a transportation solution in the first ODOT Region 1 corridor bottleneck operations study (CBOS).

In addition to the highlighted projects, a list of transportation projects which were completed from the 2021-2024 MTIP are identified in Table 2-1. For the purposes of this report, completed transit projects are those projects that have executed their grant agreement with FTA and have completed all or significant portions of construction or capital acquisitions. Programmatic work, such as the Regional

**Obligation** – An obligation is the Federal government's legal commitment to pay the federal share of a project's cost. An obligated project is one that has been authorized by the federal agency (e.g. FHWA or FTA) as meeting eligibility requirements and is prepared to spend funds consistent with federal rules.

Travel Options program, are on-going and therefore considered completed upon contractual obligation of program funds with FHWA or FTA to carry out the program work. All other projects are considered completed when the project received a second note status from ODOT which typically indicated the project is open and operational.

**Table 2-1. Completed Projects from the 2021-2024 MTIP**

Project Sponsor	Project Name
Multnomah County	Hawthorne Bridge Ramps
Multnomah County	Sandy Boulevard: Gresham to 230 <sup>th</sup> Avenue
ODOT	Cornelius Pass Road Arterial Corridor Management
ODOT	I-5 Bridge ramp at Capitol Highway/Barber Boulevard
ODOT	OR217: OR10 to OR99W widening
ODOT	OR99W: Barber Boulevard at SW Capitol Hwy
ODOT	OR99W: I-5 – McDonald St
ODOT	US26: OR217 – Cornell Road re-pave
Portland	Central City in Motion
Portland	East Portland Access to Employment and Education
Portland	NW Thurman St Bridge over Macleay Park
Portland	OR99W/Barber Area: Sidewalk Infill
Portland	Red Electric Trail: SW Bertha – SW Capitol Hwy
Sherwood	Cedar Creek/Tonquin Trail: OR99W – SW Pine St
SMART	Bus Purchases
TriMet	Bus Purchases
TriMet	Better Red MAX extension project

*(Draft information provided. Section to be completed as part of the 2024-2027 MTIP adoption draft.)*

## What project delays occurred and what is carryover from the 2021-2024 MTIP?

Even the most rigorously planned project can encounter delays due to issues such as unknowable field conditions, commodities price fluctuations, or labor shortages. The projects and programs represented in the 2021-2024 MTIP are not immune to the unexpected. The following section identifies a list of transportation projects which were first programmed in the 2021-2024 MTIP which have been delayed and carried over to the 2024-2027 MTIP. Delayed projects are defined as those transportation projects or programs which originally programmed a construction phase prior to federal fiscal year 2024, but are not expected to obligate the construction phase by August 1, 2023. Project delays to operations and maintenance projects are not included.

**Table 2-2. Projects from the 2021-2024 MTIP carried over to the 2024-2027 MTIP**

*(Information currently being collected. Section to be completed as part of the 2024-2027 MTIP adoption draft.)*

## Investment Highlights and Outcomes of the 2024-2027 MTIP

*This section to be completed as part of the adoption draft of the 2024-2027 MTIP.*



## CHAPTER 3: 2024-2027 MTIP PERFORMANCE EVALUATION RESULTS

A performance evaluation was conducted to understand the effects of the 2024-2027 MTIP investment package towards the region's goals for the transportation system. The following section includes a brief overview of the performance assessment and key takeaways from the analysis. Further detail about the technical approach used in the performance evaluation can be found in Appendix I.

### Summary of 2024-2027 MTIP performance evaluation results and findings

Overall, the 2024-2027 MTIP package of investments makes marginal progress towards the desired outcomes identified in the Regional Transportation Plan (RTP). For certain outcomes and goals, the 2024-2027 MTIP package of investments performs slightly better than others, but overall, the \$1.4 billion dollar package of investments only makes minor progress towards regional goals and outcomes.<sup>1</sup>

The 2024-2027 MTIP was evaluated against four key RTP priority outcomes: addressing safety, equity, climate change and mobility as well as the overarching goal to preserve and maintain the existing transportation system. Table 3-1 provides a snapshot summary of the analysis results.

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<sup>1</sup> The \$1.4 billion dollar investment package represents the draft 2024-2027 MTIP as of January 2023. The package of investments put forward for the 2024-2027 MTIP public comment represents a smaller investment package at \$1.3 billion.

#### Chapter sections

- Summary of 2024-2027 MTIP performance evaluation results and key findings
- Analysis methodology summary
- Analysis results by performance measure
- Moving ahead towards progress in the 21st century (MAP-21) – Federal performance measures and targets



**Table 3-1. Summary of 2024-2027 MTIP Performance Analysis by RTP Priority**

RTP Priority or Overarching Goal	Overall Performance
Equity	+/o
Safety	o
Mobility	o
Climate Change	o
Preservation and Maintenance	+

Key:

o neutral or progress/regression is very minimal

^ not addressing the region's priority; has other benefits

+ trending towards the desired outcome for that priority

- trending away from the desired outcome for that priority

+/o neutral or minimal progression with trajectory to trend toward desired outcome

-/o neutral or minimal regression with risk/trajectory to trend away from desired outcome

### Summary of 2024-2027 MTIP profile for the performance evaluation

The 2024-2027 MTIP represents a unique near-term package of investments differing from previous MTIP cycles. Developed during the uncertainty of the global coronavirus pandemic and impacted by the sudden rapid rise of inflation, these and other factors have led to a smaller total number of transportation investments reflected in the 2024-2027 MTIP investment package, while being on par or slightly larger dollar-wise than previous MTIP investment packages (i.e. 2021-2024; 2018-2021). Also unique to the 2024-2027 MTIP is over half of \$1.4 billion are dollars going towards preservation and maintenance of the existing transportation system. This differs from previous MTIP cycles, where capital investments comprised of a greater percentage of the four-year investment package.<sup>2</sup>

Maintenance and preservation investments range from pavement repair to bridge deck resurfacing to replacement of culverts. Local dollars – whether its funding from the state or generated locally – usually comprise the bulk of preservation and maintenance investments and sit outside of the MTIP, where capital investments are often more the focus of federal funds.<sup>3</sup> But the unique circumstances of increased federal formula funding, rising inflation impacting project costs, and continued emphasis on maintaining the existing system created a near-term investment package heavily focused on preservation and maintenance. Tables 3-2 through 3-4 provides a breakdown of the 2024-2027 MTIP investment profile evaluated.

### 3-2. 2024-2027 MTIP Investment Profile by Mode (as of January 2023)

Mode	Dollar Amount	Percentage Overall Programming
Active Transportation	\$167,038,193	12%
Regional Program	\$65,386,312	5%
Roadway and Bridge	\$405,733,749	29%
Transit	\$719,872,320	51%
Transportation System Management and Operations	\$52,630,453	4%

<sup>2</sup> The Metropolitan Transportation Improvement Program does not account for locally generated revenue dedicated for preservation and maintenance, especially for local streets. As a result, the MTIP only depicts a fraction – primarily the state and federal contributions – of the overall investment going towards preservation and maintenance of the transportation system.

<sup>3</sup> Some federal funding programs are restricted to preservation and maintenance activities.

<b>TOTAL</b>	<b>\$1,410,661,027</b>	100%
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### 3-3 – 2024-2027 MTIP Investment Profile by Investment Type (as of January 2023)

Investment Type	Number of Projects	Dollar Amount	Percentage Overall Programmed
Capital Investment	54	\$552,465,335	39%
Operations	25	\$101,451,038	7%
Planning	11	\$35,240,988	2%
Preservation and Maintenance	18	\$721,503,666	51%
<b>TOTAL</b>	<b>108</b>	<b>\$1,410,661,027</b>	<b>100%</b>

### 3-4. 2024-2027 MTIP Investment Type by Fund Source Agency (as of January 2023)

Fund Source Agency	Capital	Operations	Planning	Preservation and Maintenance
ODOT Funding Programs	\$188,148,858	\$64,893,478	\$12,732,983	\$218,517,266
Metro RFFA	\$245,354,597	\$8,076,471	\$22,508,005	\$0
SMART	\$5,000,000	\$51,250	\$0	\$2,810,000
TriMet	\$113,961,880	\$28,429,839	\$0	\$500,176,400
<b>TOTAL</b>	<b>\$552,465,335</b>	<b>\$101,451,038</b>	<b>\$35,240,988</b>	<b>\$721,503,666</b>

Preservation and maintenance investments are not typically included as part of the performance evaluation of the MTIP investment package. Therefore, the remaining \$700 million of investments to make up the 2024-2027 MTIP are the drivers to the investment package performance towards regional goals and objectives.

Also noticeable are capital investments tend to be smaller scale projects focused on meeting community transportation needs or addressing a transportation safety issue. As of spring 2023, the 2024-2027 MTIP does not include a major capital roadway or transit project.<sup>4</sup> The majority of the 2024-2027 MTIP capital investments comprises of smaller complete streets/pedestrian safety type projects as well as technology and system demand management type projects to support greater movement, whether by walking, bicycling, transit, or gaining efficiency through the existing system.

Therefore, while the package of investments represented in the 2024-2027 MTIP making only very slight progress towards regional goals, the individual transportation projects and programs within the 2024-2027 MTIP are likely to have greater impacts to the local communities in which they are located. The 2024-2027 MTIP capital investment reflects transportation projects and programs which address local and community specific needs. While a new complete streets project have lesser a regional scale impact

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<sup>4</sup> Several major freeway-throughway and high capacity transit projects are in active stages of development, but as of January 2023, are not ready for inclusion in the 2024-2027 MTIP. Therefore these major projects are not included in the performance evaluation despite being active projects. The 2024-2027 MTIP performance evaluation primarily focuses on the analysis and performance of the remaining capital projects. When the major projects are ready for inclusion in the 2024-2027 MTIP through an amendment request, a performance evaluation will take place to assess how the major project effects progress towards the region's goals and objectives.

towards the reduction of greenhouse gases, it does provide large local impact for the community where the enhance street is located. Investments into local streets are necessary for supporting the mobility and more broadly the livability for the region’s residents and visitors. Additionally, the 2024-2027 MTIP includes seven percent investment in transportation system management and operations on the region’s throughway system as well as arterials and local streets. These smaller dollar investments support gaining efficiency out of the existing system.

Each investment in the 2024-2027 MTIP brings an immediate local value. As the number of small local enhancements build up and combined with system efficiency projects, the eventual performance will compound to create system-wide effects, which do not present well in the evaluation. These results illustrate that the 2024-2027 MTIP investments continue to make progress, even if only marginally or incrementally, towards the region’s long-term goals for the transportation system, but there remain opportunities for improvement.

Analysis methodology summary

Evaluation framework

The Regional Transportation Plan (RTP) sets the long-range vision, goals, and outcomes for the regional transportation network. The 2018 RTP, as the region’s most recently adopted regional plan serves as the policy direction for the 2024-2027 MTIP.

The approach to evaluate the 2024-2027 MTIP centers on the four RTP policy priorities – safety, equity, climate, and mobility as well as the overarching RTP goal of system preservation and maintenance. The 2024-2027 MTIP analysis utilizes the same performance measures and system-wide analysis approach from the 2018 RTP, meaning transportation projects programmed in the 2024-2027 MTIP are not evaluated independently.<sup>5</sup> Using this approach allows Metro to demonstrate consistency with the region’s long-range transportation plan and show progress towards advancing the goals and outcomes identified in the RTP. <sup>6</sup> Table 3-5 identifies the performance measures and the crosswalk between the RTP goals being measured.

Table 3-5. Crosswalk between RTP Priorities and 2024-2027 MTIP Performance Measures

2018 RTP Priority	Outcome Being Measured	Performance Measure
Equity	Accessibility	<ul style="list-style-type: none"><li>• Access to jobs (emphasis on middle-wage)</li><li>• Access to community places</li><li>• System completeness of active transportation network in equity focus areas</li></ul>
Safety <sup>7</sup>	Safety investment & Investment on high injury corridors	<ul style="list-style-type: none"><li>• Level of investment to address fatalities and serious injuries</li><li>• Level of safety investment on high injury corridors, and high injury corridors in equity focus areas</li></ul>

<sup>5</sup> Transportation investments can also be referred to as transportation projects.  
<sup>6</sup> Per federal regulations, the content of the MTIP must demonstrate consistency with the adopted Regional Transportation Plan from a policy and a fiscal manner.  
<sup>7</sup> Because crashes cannot be projected, this performance measure will take an observed approach looking at the level of safety investment and location of safety investment.

Address Climate Change	Emissions reduction & Active transportation system completion	<ul style="list-style-type: none"> <li>• Reduction of greenhouse gases per capita</li> <li>• System completeness of active transportation network</li> </ul>
Mobility	Travel characteristics	<ul style="list-style-type: none"> <li>• Mode split (e.g. driving, transit, bike)</li> <li>• Miles traveled by mode (e.g. vehicle, bike, transit) per capita</li> </ul>

Three main tools are used to evaluate the 2024-2027 MTIP investment package. These tools are:

- Travel Demand Model
- Motor Vehicle Emissions Simulator (MOVES) Model
- Geographic Information Systems (GIS)

These tools were also used for the 2018 RTP system performance analysis. Table 3-6 provides a short description of each individual performance measure and the evaluation tool used. More details on the methodology are included as part of Appendix I.

**Table 3-6. Short Description of Individual Performance Measures**

Performance Measure	Analysis Tool	Description
Access to Jobs	Travel Model	Weighted average household access to jobs within a 30-minute driving commute or 45-minute transit commute.
Access to Community Places	Travel Model	Weighted average household access to community places within a 20-minute driving commute or 30-minute transit commute.
Active Transportation System Completeness	GIS	Miles and percentage of active transportation infrastructure added to the completeness of the regional active transportation work.
Level of Investment in Safety	GIS	Amount of investment of safety activities which address fatalities and serious injuries crashes.
Level of Investment in Safety on High Injury Corridors and Equity Focus Areas	GIS	Amount of investment of safety activities which address fatalities and serious injuries crashes on high injury corridors, equity focus areas, and high injury corridors in equity focus areas
Reduction of Greenhouse Gas Emissions	Travel Model & Emissions Model	Projected daily metric tons of greenhouse gas emissions reduction and per capita.
Mode split and trips	Travel Model	Average weekday number of trips made by different modes of travel (e.g. walking, biking, taking transit, driving alone, etc.). Calculate percentages of trips to determine mode splits
Miles traveled	Travel Model	Average weekday miles traveled by different modes of travel (e.g. vehicle, transit, bike)

## Analytical tools key assumptions and limitations

Embedded within the 2024-2027 MTIP performance evaluation are several key assumptions and limitations to the analytical tools. The assumptions can be broken down into two areas: model

assumptions and geospatial assumptions. The modeling assumptions are most applicable to the mobility, climate change, and part of the equity performance measures. Whereas the geospatial assumptions are most applicable to the safety and the equity performance measures.

**Model assumptions:** The 2024-2027 MTIP performance evaluation included three scenarios which were modeled using the travel demand modeling tool. Each scenario serves as a reference point for understanding the effect of the 2024-2027 MTIP package of transportation investments reflected in the build (2027) scenario. The base year scenario provides context for performance relative to a baseline condition and understand how population and employment growth affects performance. Whereas the comparison between the build and no build provides a better understanding of how the capital investments contribute towards the performance of the transportation system. The scenario assumptions are identified in Table 3-7.

**Table 3-7. Scenario Assumptions**

Scenario	Inputs	Land Use	Transit Service	Parking
Base Year (2020) <sup>8</sup>	Transportation investments built and open for service in the first half of 2021.	Population and employment distributions for the adopted 2020 distributive forecast.	Transit service in effect as of January 2020.	Reflects observed parking costs as of 2020.
No Build (2027)	Transportation investments with committed funding plan through construction in 2023. <sup>9</sup>	Projected growth in population and employment according to the adopted 2020 distributive forecast and interpolated for 2027. <sup>10</sup>	Transit service from the Forward Together service reimagining effort. Also includes transit service expansions of Division Transit Project and MAX Red Line extension.	Assumes the higher value parking rates of either 2020 Base Year or 2018 RTP financially constrained 2027 network parking values for each zone.
Build (2027)	Transportation investments identified in the 2024-2027 MTIP. These investments include capital investments and as modeling capabilities allow. <sup>11</sup>		Same transit service as 2027 No Build. Assumes no additional transit service beyond what was composed for Forward together. No major transit service expansions.	

**Geospatial assumptions:** For the 2024-2027 MTIP performance measures which primarily use geospatial analysis to evaluate the package of investments, the underlying base network is Metro’s published

<sup>8</sup> This is the same base year used as part of the 2023 RTP.

<sup>9</sup> Fully committed funding would need to be reflected in the 2024-2027 MTIP programming and financial plan.

<sup>10</sup> This means the population, employment, and distribution is estimated based on an interpolation from the base year (2020) forecast to the out year forecast (2027).

<sup>11</sup> Those investments which are unable to be quantitatively assessed because of a lack of spatial detail will be identified as part of analysis documentation. The investment may be assessed qualitatively in how they play a role in making progress towards the 2018 RTP priorities and/or the MAP-21 federal performance targets.

Regional Land Information System (RLIS) data. The RLIS network primarily applies to the system completion assessment and the safety assessment.

The other key geospatial assumption is the definition of the high injury corridors and intersections. The high injury corridors and intersections were defined as part of the development of the Regional Transportation Safety Plan, adopted as part of the 2018 RTP. The high injury corridors and intersections for the Portland metropolitan region are based on analysis of crash data and other information and updated in 2022 with transportation safety data from 2016-2020. Information regarding the high injury corridors can be found in Appendix I.

## Evaluation geography and inputs

### Geography of analysis

**Region:** The 2024-2027 MTIP focuses on the near-term investments for the regional transportation system within the metropolitan planning area (MPA). The MPA is the defined geography for Metro's metropolitan planning organization (MPO) activities. Region or system-wide figures reported are for the MPA.

**Sub-Regions:** To gather a better understanding of the performance of the 2024-2027 MTIP investment profile at a local scale, the evaluation approach includes a sub-regional analysis as part of the system analysis for select performance metrics.<sup>12</sup> The 2024-2027 MTIP performance evaluation examines how projects perform in the following sub-regions:

- City of Portland
- Clackamas County
- Multnomah County (excludes city of Portland)
- Washington County

For the county sub-regions, only the urbanized portion of Clackamas, Multnomah, and Washington counties within the metropolitan planning area were part of the sub-regional assessment. Rural areas, which are outside of the metropolitan planning area were not included.

**Equity focus areas:** Equity focus areas represent geographic areas where there is a greater number of marginalized persons and communities. More specifically, equity focus areas identify areas where the following demographic characteristics at population rates above certain regional thresholds and certain density thresholds.

- People of Color
- People with Lower-Incomes
- People with Limited English Proficiency/People who do not speak English well

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<sup>12</sup> Performance analysis results for sub-regions are provided with the appendices. Only select sub-regional analysis are reported as part of the summary of the 2024-2027 MTIP performance evaluation.



Demographic information comes from the U.S. Census Bureau. Updates to equity focus areas occur with new releases of demographic data from the U.S. Census Bureau's Decennial Census and the American Community Survey (ACS) 5-year estimates.

The evaluation measured the 2024-2027 MTIP investment performance within equity focus areas towards safety and accessibility outcomes, which are transportation priorities expressed by marginalized communities.

Figures 3-1 – 3-2 illustrates the region and equity focus area geographies for the basis of reporting the performance evaluation results.

Figure 3-1. Metropolitan Planning Area boundary map

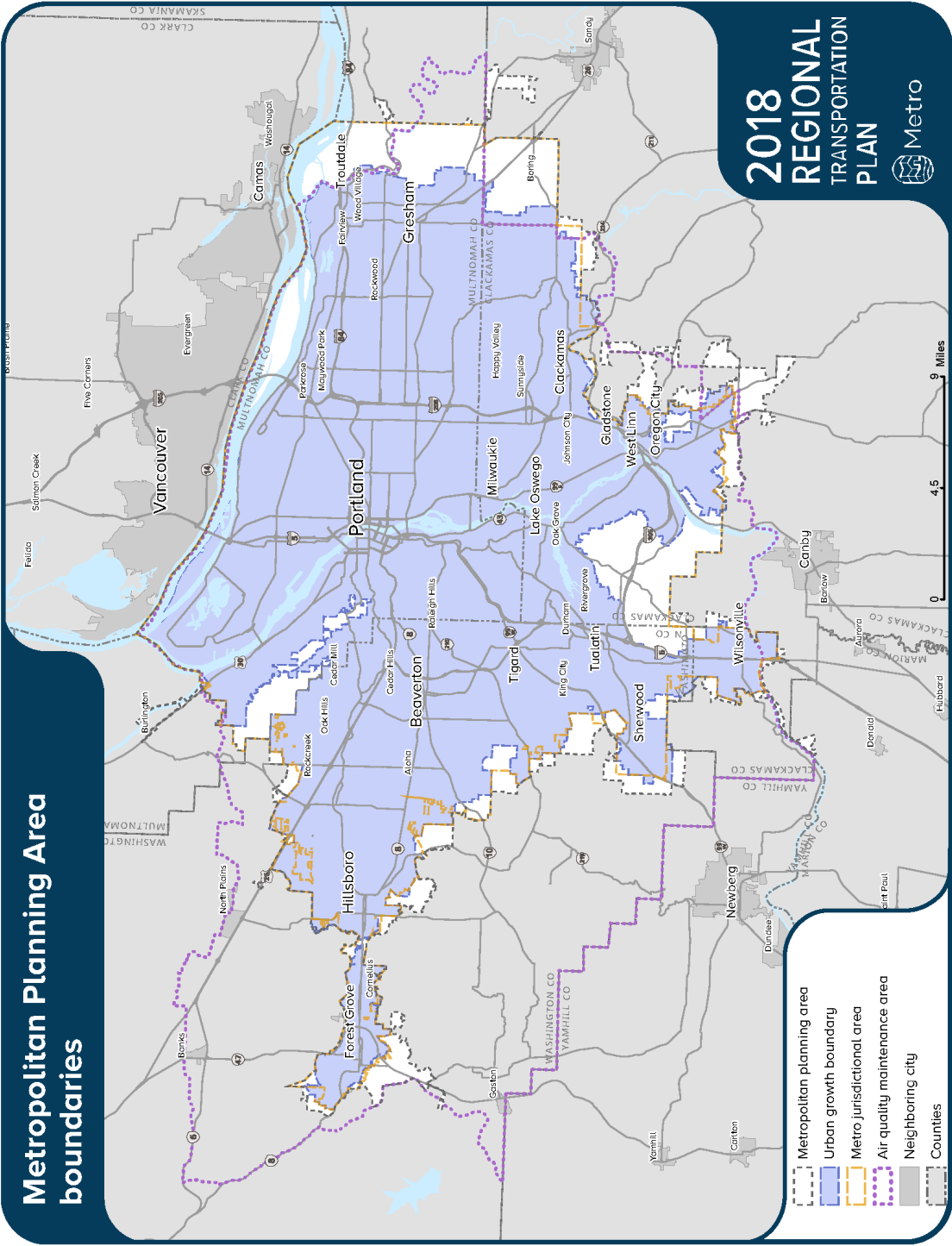
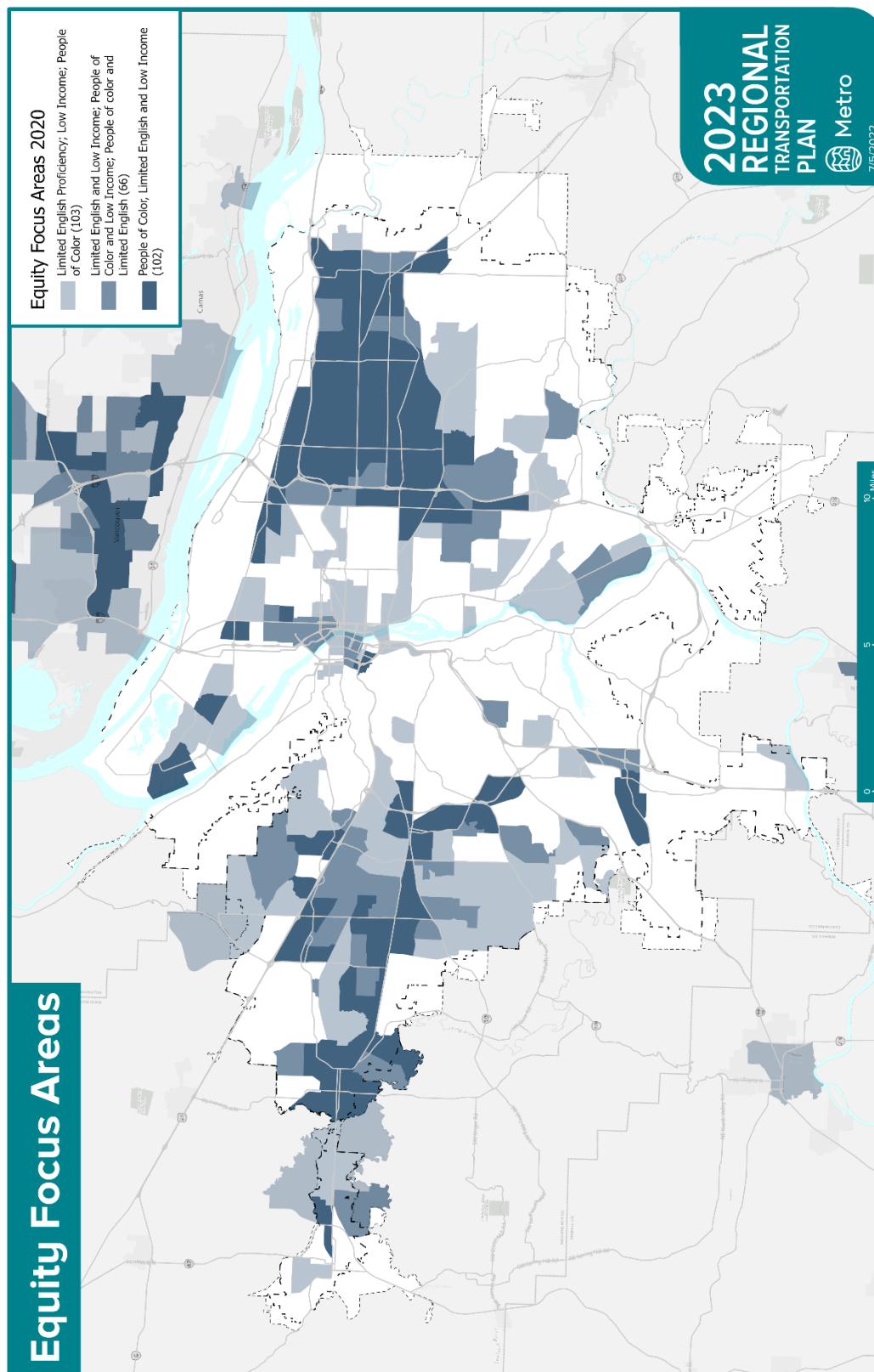


Figure 3-2. Equity focus areas



## Performance evaluation inputs - transportation investments

The 2024-2027 MTIP evaluation includes 108 transportation project and program investments programmed for federal fiscal years 2024 through 2027.<sup>13</sup> For each performance measure, only a subset of the 108 transportation projects and programs were included in the evaluation. This is due to the methodology for the individual performance measure and analysis tool deployed. For example, the safety performance measures utilize geospatial analysis techniques and a specific definition of safety to identify projects which reduce fatalities and serious injuries. Based on these specifications, only 37 of the 108 projects were evaluated in the safety analysis.

### Definition: program & programming

Refers to the schedule of when transportation projects or programs expect to expend funds. Assumed in the programming, transportation projects or programs meet the necessary federal eligibility requirements.

Several of the projects and programs included in the 2024-2027 MTIP were not evaluated. Projects and programs not evaluated meet one or more of the following criteria. These include:

- The project is programmatic in nature, meaning the investment is generally region-wide (e.g. bus purchases and replacements);
- The project is not capital investments (e.g. repaving an existing roadway; bridge deck replacement; Regional Travel Options education and outreach);
- The project is a planning project (e.g. system and corridor planning);
- The project is only programmed through project development, since details such as the alignment, type, size, and location have not been identified, thus lack the details for the evaluation tools to capture the investment.

Only in select circumstances where the project meets one of the mentioned criteria was the project or program included in the evaluation and based on the individual performance measure. Additionally, in some cases, the analysis tools deployed as part of the 2024-2027 MTIP evaluation are not granular enough to assess these types of programmatic projects.

A list of the transportation projects and programs evaluated by performance measure can be found in Appendix I.

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<sup>13</sup> As of January 2023. The public comment draft of the 2024-2027 MTIP programming tables reflect amendment updates and addition of other projects through March 2023. A project list is provided as part of the appendix to illustrate the differences in the programming tables and what was not evaluated as part of the 2024-2027 MTIP performance evaluation.

## Analysis results by performance measure

Based on the 2024-2027 MTIP performance evaluation, the package of investments show very slight incremental progress towards the RTP priorities of safety, equity, climate, and mobility. A discussion of the performance results for each priority area and measure is below. A summary of the 2024-2027 MTIP performance evaluation is provided in Table 3-1.

### Mobility

*Performance Measures: Mode share, trips and mode shift in trips, and miles traveled by mode*

Overall, the 2024-2027 MTIP investments contribute very minimally to increasing regional mobility. The result is understandable recognizing the 2024-2027 MTIP does not include a major roadway or transit project at the time of development and performance evaluation. The major roadway and high capacity transit projects combined with complimentary active transportation investments tend to have greater system-wide regional effects on mobility as compared to smaller scale complete streets and active transportation projects. However, some progress can be gleaned from the investment package. Nearly 1,000 new walk, bike, and transit trips are seen as a result of the investments and while vehicle miles traveled per capita grows ever so slightly at .1 percent from 2020, the growth is very minimal due to the mixed investment profile, when considering the 18,000 more people are projected to arrive in the region by 2027. So while regional mobility does not appear effected by the 2024-2027 MTIP investments, the lack of either progress or setback to regional mobility may be positive result considering several major transportation projects are in development and are expected to request amendment into the 2024-2027 MTIP in the near future. These projects, including two tolling projects, will have an impact on regional mobility. As the 2024-2027 MTIP moves into the implementation and administration phase, gains in regional mobility – especially by walking, biking, and transit – can be anticipated.

Table 3-8. Summary of Mobility Performance Measures Results

RTP Priority	Mode Share, Trip Shifting	Passenger, Vehicle, and Mode-Based Miles Traveled
Mobility	+/o	o

Key:

- o neutral or progress/regression is very minimal
- + trending towards the desired outcome for that priority
- trending away from the desired outcome for that priority
- +/o neutral or minimal progression with trajectory to trend toward desired outcome
- /o neutral or minimal regression with risk/trajectory to trend away from desired outcome

### Mode Share, Trips, and Mode Shift

With the 2024-2027 MTIP investments:

- Overall, person trips for an average weekday are expected to grow from 6.2 million from 2020 up to 6.7 million by 2027.
  - o Of those 6.7 million trips, a little under 1.85 million are work-related trips, while the remaining 4.9 million are non-work-related.

- The increased growth of walk, bike, and transit trips combined on an average weekday breaks 1 million trips.
  - The 2024-2027 MTIP investments only contributes marginally to the increased combined mode share with a little less than 1,000 additional walk, bike, or transit trips.
- Drive alone trips decreases by just over 500 trips per day and decreases one percent from 2020.
- Combined walking, biking, and transit mode shares project to reach 16.5 percent. This is an increase from 15.8 percent from 2020.
  - Walk mode share makes up the bulk of the combined mode share at 7.5 percent, but it does not change from 2020, even with the investments.
  - Bike mode share increases .1 percent up to 3.8 percent from 2020 but remains at 3.8 percent even with the investments.
  - Transit mode share increases from 4.1 percent in 2020 to 4.7 percent in 2027.

### 3-9. Average Weekday Total Trips by Mode of Travel and Mode Share

Mode	2020 Base		2027 No Build		2027 Build	
	Trips	Share	Trips	Share	Trips	Share
Drive Alone	2,725,524	43.5%	2,873,098	42.5%	2,872,592	42.5%
work	1,178,782	67.3%	1,214,626	65.7%	1,214,540	65.7%
non-work	1,546,743	34.2%	1,658,472	33.8%	1,658,052	33.8%
Shared Ride	2,412,020	38.5%	2,614,425	38.7%	2,613,142	38.6%
work	206,469	11.8%	219,345	11.9%	219,348	11.9%
non-work	2,205,551	48.8%	2,395,080	48.8%	2,393,794	48.7%
Transit	256,658	4.1%	319,306	4.7%	318,381	4.7%
work	125,894	7.2%	155,737	8.4%	155,027	8.4%
non-work	130,765	2.9%	163,569	3.3%	163,355	3.3%
Walk	472,144	7.5%	510,324	7.5%	510,143	7.5%
work	145,377	8.3%	153,741	8.3%	153,705	8.3%
non-work	326,767	7.2%	356,583	7.3%	356,439	7.3%
Bike	232,676	3.7%	256,368	3.8%	258,396	3.8%
work	95,816	5.5%	105,911	5.7%	106,745	5.8%
non-work	136,860	3.0%	150,457	3.1%	151,652	3.1%
School Bus	202,938	3.2%	221,931	3.3%	221,933	3.3%
Total Person Trips	6,271,931		6,761,204		6,761,218	
Total Work Trips	1,752,337		1,849,360		1,849,364	
Total Non-Work Trips	4,519,594		4,911,844		4,911,854	
Non-SOV trips*	3,373,498	55.3%	3,700,423	56.3%	3,700,063	56.3%
Bike + Walk + Transit*	961,478	15.8%	1,085,998	16.5%	1,086,921	16.5%

\*Does not include school bus trips in calculations



Based on the performance evaluation of the 2024-2027 MTIP, regional mobility as represented by mode share and trips makes minor progress towards the region's mobility goals. The combined mode share of walk, bike, and transit saw an increase from 2020 reaching 16.5 percent, but what the 2024-2027 MTIP investment profile contributed to that increase in mode share was fairly minimal in the form of a little less than a 1,000 trips shifted over to either walk, bike, or transit. While this is not a significant increase, every trip which can be shifted away from driving alone supports better management and efficiency of the regional transportation system and serve the mobility needs of different users of the transportation. The positive signs of vehicle trips shifting over to other modes of travel means the investments are targeting gaps and providing services to give the region's travelers more options for getting to and from their destination, but the investment profile does not create large changes.

Additionally, while a near one percent decrease of drive alone trips region-wide may seem minor, the 2024-2027 MTIP investments do contribute to increasing the mobility options for at the local level. The investment of \$167 million into active transportation projects in the 2024-2027 MTIP helps to address gaps in network and facilitate greater ease in traveling by another means than driving alone. The other non-freeway or non-throughway investments in the 2024-2027 MTIP focus addressing a different transportation priorities, such as safety issues. As a result, the profile of investments shows very minor changes towards regional mobility goals as they address more local scale transportation needs or other transportation issues.

### **Miles Traveled – Passenger, Vehicle, and by Mode**

With the 2024-2027 MTIP investments:

- Overall the region-wide total vehicle miles traveled is projected to reduce by 3,455 miles. This is a 7.5 percent decrease from 2020.
- Region-wide vehicle miles traveled per capita increased slightly by .1 from 2020 to 11.4, but the investment profile keeps vehicle miles traveled per capita steady.
  - Vehicle miles traveled per capita grew .1 in urban Washington County and East Multnomah County, while urban Clackamas County stayed steady and the City of Portland saw a .2 reduction in vehicle miles traveled per capita.
- While vehicle miles traveled per capita stays steady, bicycle miles traveled per capital is projected to increase .1 to reach a total of .5 bike miles traveled per capita.
- When looking at region-wide vehicle miles traveled per employee, the investment profile keeps vehicle miles traveled per employee steady at 20.6 miles, but this is an increase from 20.1 in 2020.
  - Vehicle miles traveled per employee also varies in the sub-regions where urban Washington County (1 mile) and Clackamas County (.6 mile) saw increases, but City of Portland (.3 mile) and East Multnomah County (.1 mile) saw slight decreases from 2020.
- Person miles traveled per capita and per employee increases from 16.8 miles to 17.1 miles and 29.8 miles to 31 miles from 2020. These are greater increases than vehicle miles traveled per capita and employee from 2020. The investment profile is projected to keep vehicle miles traveled per capita and employee steady.
- Transit miles traveled increased region-wide ever so slightly from 2020. Transit miles traveled per capita increases from 1.0 miles to 1.1 miles per capita and 1.7 miles to 2.0 miles per employee. The average transit trip length decreased from 6.6 miles in 2020 to 6.4 miles in 2027.

### 3-10. Average Weekday Total Passenger Vehicle Miles Traveled

	2020 Base	2027 No Build	2027 Build
Passenger Vehicle Miles Traveled	19,758,782	21,244,637	21,241,182
<i>change from 2020</i>		1,485,855	1,482,400
<i>change from 2027 No Build</i>			-3,455

### 3-11. Average Weekday Total Miles Traveled by Mode and Per Capita

	2020 Base	2027 No Build	2027 Build
Person Miles Traveled (PMT)	16.8	17.1	17.1
Vehicle Miles Traveled (VMT)	11.3	11.4	11.4
Bicycle Miles Traveled (BMT)	0.4	0.4	0.5
Pedestrian Miles Traveled	0.2	0.2	0.2
Transit Miles Traveled	1.0	1.1	1.1

### 3-12. Average Weekday Total Miles Traveled by Mode and Per Employee

	2020 Base	2027 No Build	2027 Build
Person Miles Traveled (PMT)	29.8	31.0	31.0
Vehicle Miles Traveled (VMT)	20.1	20.6	20.6
Bicycle Miles Traveled (BMT)	0.7	0.8	0.8
Pedestrian Miles Traveled	0.3	0.3	0.3
Transit Miles Traveled	1.7	2.0	2.0

### 3-13. Average Trip Length

	2020 Base	2027 No Build	2027 Build
Person Average Trip Length	4.7	4.7	4.7
Vehicle Average Trip Length	5.3	5.4	5.4
Bicycle Average Trip Length	3.1	3.2	3.3
Pedestrian Average Trip Length	0.6	0.6	0.6
Transit Average Trip Length	6.6	6.4	6.4

While the changes are slight, the results from assessing projected total vehicle miles traveled and vehicle miles traveled per capita means overall people are using a combination of different modes of travel for their trips as a result of the 2024-2027 MTIP investments. Vehicle miles traveled per capita staying steady is also a positive accomplishment recognizing the region's expected growth of 7.3 percent from 2020 to a population over 1.8 million people by 2027, averaging an additional 18,000 people per year. For the region's transportation system to be able to handle the additional daily demand without significantly increasing vehicle miles traveled per person shows how the gradual investment in multimodal options have returns over time.

The impact of the global pandemic greatly altered travel behaviors as new systems were established to keep economy active while also adhering to public health protocols. Systems such as work from home and an increase in online shopping became embedded into daily lives and continue despite being past the worst of the coronavirus crisis. In light of these travel behavior changes, the results of vehicle miles traveled and transit miles traveled per employee are interesting. Transit miles traveled per employee is higher than per capita, likely meaning work related trips tend to remain as the backbone of transit trips even with work from home becoming more prevalent. When looking at vehicle miles traveled at the sub-regions, the difference in vehicle miles traveled per employee varies based on location. This is an

indicator of the importance of land use in combination with capital transportation investments to provide travel options.

While capital investments provide the physical infrastructure to travel by different modes to facilitate the decrease in vehicle miles traveled, managing demand on the system is also a key strategy to maintain or reduce vehicles miles traveled in efforts to reach the region’s mobility goals, as well as address the region’s climate goals and meet the new state requirements established by the Climate Friendly Equitable Communities rules. About 15% of the 2024-2027 MTIP investment profile, outside of preservation and maintenance is being used for operations and demand management of the transportation system. These smaller scale transportation system management and operations investments are often difficult to capture in the performance evaluation and the existing regional tools may not have the granularity to assess the full impact of the capital investment. But observed data has shown that managing demand through tools like traveler information, speed warning signs, signal timing, and other technologies are effective in supporting mobility.

Lastly, the 2024-2027 MTIP continues programmatic investments that work in tandem to support investments in physical infrastructure and ultimately result in the decrease in vehicle miles traveled. One specific programmatic investment is the Regional Travel Options (RTO) program, which coordinates travel options education and outreach efforts, operates an employer outreach program, runs a safe routes to schools program, and runs a grant program. RTO has long supported the region’s multimodal capital investments. Results from 2015-2017 and 2017-2019 RTO program evaluations demonstrate 275,000 people participated in RTO program activities – whether that was a neighborhood event, a specific marketing campaign, or received individualized marketing – that translated into 3.9 million vehicle trips reduced or prevented.<sup>14</sup> In the four year span, the RTO program supported 7 million transit trips, 1 million walk trips, and 1.6 million bike trips while also awarding a total of \$4.6 million, through 35 grant projects. The 2024-2027 MTIP continues the investment into programs which help educate on travel options and demand management. With the region growing and an economy rebounding from the pandemic, making investments which continues to manage travel demand while allowing for people and goods getting to their destinations remain necessary, but also an area with room for continual improvement.

## Equity

*Performance measures: Access to travel options – Active transportation system completeness, access to jobs, and access to community place.*

**Table 3-14. Summary of Equity Performance Measures Results**

RTP Priority	Access to Travel Options – Active Transportation System Completeness	Transportation Safety (see Safety section)	Access to Jobs (middle and low-wage)	Access to Community Places
Equity	+/o	+/o	o	o

Key:

- o neutral or progress/regression is very minimal
- + trending towards the desired outcome for that priority
- trending away from the desired outcome for that priority
- +/o neutral or minimal progression with trajectory to trend toward desired outcome

<sup>14</sup> The 2015-2017 and 2017-2019 Regional Travel Options Program Evaluations are the most recent evaluations available. A new Regional Travel Options Program evaluation is underway.

-/o neutral or minimal regression with risk/trajectory to trend away from desired outcome

Overall, the 2024-2027 MTIP investments contributes very slightly towards addressing the transportation priorities of marginalized communities. Slight progress is projected in completing the active transportation network in equity focus areas, with the 2024-2027 MTIP investments contributing another 1 percent sidewalk and bicycle network completion. Whereas with access to jobs and community places by transit, equity focus areas are projected to increase the number of jobs and community places reached by transit, the number is very slight and when reviewing in further detail, the access results are more mixed. While these results are not dramatic in making the level of progress needed to eliminate disparities, the positive takeaway is the investments – even if limited – focus towards addressing equity focus areas and the transportation needs of marginalized communities. For example, while active transportation system completeness increases by 1 percent, the highest level of system completion are sidewalks near transit stops and stations in equity focus areas reaching 75 percent. Another clear case of equity focused investment is with transportation safety. While overall less funding was allocated towards transportation activities that reduce crashes which result in fatalities and serious injuries, of those investments 87 percent were directed towards the high injury corridors in equity focus areas.

The result of minimal progress towards transportation priorities expressed by marginalized communities is understandable recognizing the unique investment profile of the 2024-2027 MTIP at this time. The limited number of capital investments makes it challenging to address the myriad of necessary investment needed to address the transportation disparities in access and safety experienced by marginalized communities. The heavy emphasis on preservation and maintenance of the existing system leaves less opportunity for making progress towards regional goals, but even with limited opportunities partners are making the most of the dollars by prioritizing investments to address transportation equity. Lastly, while there are significant concerns with several of the region's a major roadway or transit projects in development, the development processes have given greater consideration of how the major projects may impact marginalized communities as well as address historic inequities and reduce disparities. The open discussion of transportation equity being undertaken in the development of the major roadway and high capacity transit projects is a step forward and the hopeful outcome is that these major projects are designed and implemented in a manner that advances transportation equity through greater access, safety, and reducing disparities.

### **Access to Travel Options – Active Transportation System Completeness**

With the 2024-2027 MTIP investments:

- Contributes to the system completeness of the active transportation network by adding:
  - 11 miles of added sidewalks
  - a little over 8 miles of on-street bicycle infrastructure
  - a little over 8 miles off-street trails
- The region continues to complete gaps in the regional active transportation network with an emphasis on system completeness in equity focus areas
  - Region-wide pedestrian network completion increases from 70 percent to 71 percent in equity focus areas as a result of the 2024-2027 MTIP investments. Pedestrian network system completeness near transit in equity focus areas reaches 75 percent, the greatest

level of system completeness across the network. Region-wide pedestrian network system completeness is 58 percent and near transit is 65 percent.

- The on-street bicycle network completion in equity focus areas increases from 61 percent to 62 percent. Region-wide on-street bicycle network completeness is 55 percent with the 2024-2027 MTIP investments.
  - The greatest gains in system completeness observed from the 2024-2027 MTIP investments is in trail network completion in equity focus areas, which increases by 4 percent and reaching 49 percent.
- The region continues to move in the right direction with system completeness. The region is investing \$167M out of 1.4B (total) in active transportation. Considering that half of the \$1.4 billion is for preservation and maintenance of the existing transportation system, roughly 30 percent of the capital investment program of the 2024-2027 MTIP is going towards active transportation and system completeness.
  - Elements like pedestrian crossings are not captured in the results of the analysis. The number of pedestrian or active transportation projects which includes pedestrian crossing features includes 40 projects representing around \$181M. Many of those pedestrian investments will be in equity focus areas.
- The completion of sidewalk, bike, and trail gaps on the active transportation network is greater in equity focus areas and is equivalent or outpaces the percentage of system completion for the region and non-equity focus areas.
- Nonetheless, the region remains far from its goal of reaching 100 percent completion and build out of the regional active transportation network.

### 3-15. Active transportation system completeness results

Network	Total miles	Number of miles completed	Miles from 24-27 MTIP	Percent miles completed existing	Percent miles completed w/24-27 MTIP
<i>Region-wide</i>					
Pedestrian (on street) network	1,040.08	593.77	11.00	57%	58%
Bicycle (on street) network	1,148.53	624.18	8.07	54%	55%
Trail network	560.10	244.56	8.28	44%	45%
Motor vehicle network	1,170.86	1,145.71	0.07	98%	98%
<i>Near transit</i>					
Pedestrian (on street) network	836.58	536.09	10.92	64%	65%
Bicycle (on street) network	880.78	534.12	7.89	61%	62%
<i>Along arterials</i>					
Pedestrian (on street) network	725.37	411.42	8.92	57%	58%
Bicycle (on street) network	619.44	410.31	5.84	66%	67%
<i>Within urban centers</i>					
Pedestrian (on street) network	181.27	139.57	1.37	77%	78%
Bicycle (on street) network	168.13	110.25	1.07	66%	66%
<i>Within station communities outside above centers</i>					
Pedestrian (on street) network	107.63	71.05	0.92	66%	67%
Bicycle (on street) network	123.34	67.58	0.78	55%	55%
<i>Within mixed-use zoning outside above centers &amp; station communities</i>					
Pedestrian (on street) network	136.01	103.12	1.20	76%	77%
Bicycle (on street) network	114.32	72.93	1.12	64%	65%

The 2024-2027 MTIP investments continue to make incremental progress towards completing the active transportation network. While active transportation investments only make up a little over \$167 million of the overall \$1.4 billion to comprise the 2024-2027 MTIP, the active transportation investments are very intentional and look to make the greatest impact possible. Emphasis on completing the active transportation network in equity focus areas continues and as a result, with the 2024-2027 MTIP investments, pedestrian network completeness near transit in equity focus areas reaches 75%, which is the overall greatest amount of active transportation system completeness. This illustrates the region's targeted and focused



*The investments in the 2024-2027 MTIP will build out infrastructure to make it safer for pedestrians and bicyclists to get to transit stops.*



efforts to complete the active transportation network in areas marginalized communities live – communities who more often walk, bike, or take transit, as part of their daily mobility.

Interestingly, for the second MTIP cycle in a row, active transportation network system completeness saw the greatest increase in the completion of the trail network. The 2024-2027 MTIP investments will result in a four percent increase in trail network completion. The 2021-2024 MTIP investments saw a five percent increase in trail completion. Given that the trail network completion has the lowest completion rate at 44 percent to start with, any new investments tend to make a greater impact in overall completion. Nonetheless, the 2024-2027 MTIP includes a couple of major trail network investments including the Council Creek Regional Trail. The Council Creek Regional Trail project will not only create a parallel multiuse path in a former rail corridor near the Tualatin Valley highway corridor, but it will also serve a number of racially and socioeconomically diverse communities by providing a safe, separated path for travel.

### 3-16. Active transportation system completeness in equity focus areas

Network	% Complete EFAs	% Complete EFAs w/MTIP	% Complete non-EFAs	% Complete non-EFAs w/MTIP	Total % Complete	Total % Complete w/MTIP
Pedestrian network (on-street)	70%	71%	45%	46%	57%	58%
Pedestrian network (on-street) near transit	74%	75%	53%	55%	64%	65%
Bicycle network (on-street)	61%	62%	48%	49%	54%	55%
Bicycle network (on-street) near transit	65%	66%	56%	57%	61%	62%
Trail network (off-street bike & ped)	45%	49%	43%	43%	44%	45%
Trail network (off-street bike & ped) near transit	51%	55%	51%	51%	51%	53%

The 2024-2027 MTIP investments continues to make small increases in active transportation system completion regionwide. When considering the amount of investment needed to complete the regional active transportation network exceeds \$3 billion, the small investment of \$167 million over the next four federal fiscal years makes the appropriate amount of progress. Nonetheless, since the adoption of the 2018 RTP, the emphasis to address equity has resulted in strategic and intentional active transportation investments that serve marginalized communities. The level of active transportation network system completion in equity focus areas are higher than the non-equity focus areas across the region. Pedestrian and on-street bicycle network completion is greater than 60 percent in equity focus areas as compared to non-equity focus areas where completion is no greater than 45 percent. Active transportation system completeness near transit is greatest, where pedestrian network completion is 75%, the highest level of system completion for any active transportation system. The higher completion level in equity focus areas reflects the policy direction set forth in the 2018 RTP to prioritize the needs and outcomes expressed by marginalized communities. Active transportation system completion, because of its role in accessibility and supporting transportation safety, remains a priority for marginalized communities, as heard through public outreach and engagement with these communities.

While the 2024-2027 MTIP reflects an infusion of funding available through BIL and the Oregon Transportation Commission conscious decision to increase funding for active transportation statewide, the relatively small amount programmed in 2024-2027 MTIP towards active transportation is also a reflection of cost of inflation impacting the delivery of capital infrastructure projects. Many similar active transportation projects from previous cycles had costs which were much less, but the increase cost of materials, supply chain effects, and other factors have made it more costly to deliver infrastructure projects.

### **Performance measure: Access to jobs and community**

With the 2024-2027 MTIP investments:

- Region-wide access to jobs and community places by transit and automobile (i.e. driving) increased very slightly and/or remains unchanged.
  - Where accessibility to jobs and community places region-wide increases very slightly, the total number of newly accessible jobs or community places ranges from 1 to 30. The slight change does not make up a full percentage. This is regardless whether accessibility is by automobile or transit or during the peak period or off-peak period of travel.
  - Where accessibility to jobs and community places by transit appears unchanged is a result of the same transit service network being applied because the transit service will be delivered regardless of the near-term capital investments. The lack of a new transit capital project ready for inclusion in the 2024-2027 MTIP created a unique scenario where transit service remains the same irrespective of the 2024-2027 MTIP investments.
- Accessibility to jobs and community places in equity focus areas tends to increase just slightly more than non-equity focus areas, particularly as it relates to transit accessibility. This result is regardless of peak or non-peak period of travel. But in general, transit accessibility in equity focus areas remains higher than non-equity focus areas.
  - The one area of exception is in Clackamas County where the number of jobs and community places accessible for equity focus areas compared to non-equity focus varies based on model of travel and time of day.

### 3-17. Region-wide Accessibility to Jobs – Totals

	Change Between 2027 Build & No Build		2027 No Build		2027 Build	
	Driving	Transit	Driving	Transit	Driving	Transit
<b>All Jobs – Peak Period</b>						
Region	439	20	437,316	73,698	437,755	73,719
Non-Equity Focus Areas	323	7	420,121	53,005	420,444	53,012
Equity Focus Areas	527	30	450,330	89,360	450,857	89,390
<u>Low-Wage Jobs</u>						
Region	207	10	207,288	35,018	207,495	35,027
Non-Equity Focus Areas	155	4	198,989	25,257	199,144	25,261
Equity Focus Areas	246	14	213,569	42,404	213,816	42,418
<u>Middle-Wage Jobs</u>						
Region	122	5	120,298	20,222	120,420	20,227
Non-Equity Focus Areas	90	2	115,645	14,524	115,735	14,526
Equity Focus Areas	145	8	123,820	24,534	123,965	24,542
<b>All Jobs – Off Peak Period</b>						
Region	404	13	505,883	72,719	506,287	72,732
Non-Equity Focus Areas	291	1	494,161	52,068	494,452	52,069
Equity Focus Areas	490	22	514,755	88,347	515,244	88,370
<u>Low-Wage Jobs</u>						
Region	194	7	239,902	34,549	240,096	34,556
Non-Equity Focus Areas	136	1	234,167	24,818	234,303	24,819
Equity Focus Areas	237	12	244,244	41,914	244,481	41,925
<u>Middle-Wage Jobs</u>						
Region	110	3	139,137	19,952	139,247	19,955
Non-Equity Focus Areas	82	0	135,998	14,266	136,080	14,267
Equity Focus Areas	131	5	141,512	24,255	141,643	24,261

The 2024-2027 MTIP package of investments is projected to make slight increases or keeps steady accessibility to jobs and community places by transit and automobile (i.e. driving) even during peak and non-peak period of travel. While the 2024-2027 MTIP is expected to make \$1.4 billion of transportation investments over the course of the next four years, the unique investment profile heavily emphasizing preservation and maintenance of the existing system, system management strategies, and active transportation, do not create large impacts to accessibility by driving or transit. Those roadway and active transportation projects – modest in size and scale – included in the regional travel demand model were not enough in aggregate to move the regional needle on metrics related to accessibility. (See Appendix X for a list of projects modeled as part of the accessibility analysis.) The lack of a major capital investment in the 2024-2027 MTIP limits the progress towards the region’s accessibility and ultimately addressing equity. For example, the 2024-2027 MTIP does not include a major capital roadway or high capacity transit project. As the first MTIP cycle since the late 1990s where a high capacity transit project was not included in the MTIP, this created a unique situation where the transit service levels analyzed were the same regardless of capital investment and therefore the growth in accessibility is unchanged.

This is not to suggest that the profile of transportation investments currently represented in the 2024-2027 MTIP does not contribute to increased accessibility. Each project certainly does contribute, particularly completing gaps in the active transportation network to foster viable travel options. However, the overall impacts at a regionwide scale necessitates large capital investments which triggers changes travel behavior across the system or on specific regional facilities. The 2024-2027 MTIP is highly focused on transportation projects serving local communities, addressing a safety concern, or maintaining an existing roadway or transit rails.

As it pertains to equity, accessibility jobs and community places starts at a higher baseline number in equity focus areas as compared to non-equity focus areas (e.g. 89,000 jobs accessible by transit for households in equity focus areas vs. 53,000 jobs accessible by transit for households in non-equity focus areas). When adding in the 2024-2027 MTIP investments, the total increase in accessibility in equity focus areas tends to be greater in equity focus areas than the non-equity focus areas. More specifically, the analysis projects the increased accessibility to jobs – particularly middle or lower wage jobs – for the average household in an equity focus increases by 5-14 more jobs by transit or 131-246 more jobs by automobile, regardless of time of day for travel. Accessibility to community places for the average household in an equity focus area increases by 1-3 more places by driving and remains unchanged for transit regardless of time of day. Compared to the non-equity focus areas where middle and low-wage job access increases by 82-155 by driving and 1-4 by transit regardless of time of travel as well as an increase in community place access by 1-3 by driving and unchanged by transit regardless of time of travel.

### 3-18. Region-wide Accessibility to Community Places – Totals

	Change Between 2027 Build & No Build		2027 No Build		2027 Build	
	Driving	Transit	Driving	Transit	Driving	Transit
<b>All Community Places – Peak Period</b>						
Region	4	0	2,730	442	2,734	442
Non-Equity Focus Areas	3	0	2,561	314	2,564	314
Equity Focus Areas	5	0	2,859	538	2,863	538
<b>All Community Places – Off Peak Period</b>						
Region	3	0	3,202	432	3,205	432
Non-Equity Focus Areas	2	0	3,066	314	3,067	314
Equity Focus Areas	3	0	3,305	522	3,309	522

The lack of change in accessibility by transit, particularly for community places, is because of the same transit service networks assessed regardless of the 2024-2027 MTIP investment package and the lack of a new transit capital project ready for inclusion in the 2024-2027 MTIP. The transit service network driving the accessibility results reflects TriMet’s forward together updated transit service planning effort. Responding to the impacts of the global pandemic and travel needs of essential workers, Forward Together is a reimagined transit service network to better serve transit riders who depend on transit including communities of color and lower income households. Those service improvements are reflected in the accessibility analysis and in certain aspects, the reconfigured transit service better supports transit access to low and middle-wage jobs, which are the jobs marginalized communities voiced needing better transit access. In combination with equity focus areas already having a greater number of jobs and community places accessible than in non-equity focus areas, the added bonus of increased access at a

slightly higher number compared to non-equity focus areas means the regional policy direction is better serving the transportation needs of marginalized communities.

When looking down at the sub-regional scale, the pattern of accessibility to jobs and community places, whether by driving or transit regardless by time of day, tends to mirror the results for the region. Some small differences in higher performance can be observed within certain sub-regions, such as with the City of Portland and East Multnomah County. In the case of the City of Portland, accessibility to low and middle-wage jobs by transit regardless of time of day (i.e. peak or off-peak travel period) for equity focus areas increases more than the regional average for equity focus areas. In the case of East Multnomah County, accessibility to low and middle-wage jobs by transit during the peak travel period for equity focus areas increases 3-5 times more than the regional average.

### 3-19. Sub-Regional Accessibility to Jobs – Totals

	Change Between 2027 Build & No Build – All Jobs		Change Between 2027 Build & No Build – Low Wage Jobs		Change Between 2027 Build & No Build – Middle Wage Jobs	
	Driving	Transit	Driving	Transit	Driving	Transit
<b>City of Portland – Peak Period</b>						
City of Portland	373	26	179	12	102	7
Non-Equity Focus Areas	188	8	96	5	50	2
Equity Focus Areas	504	38	238	17	138	11
<b>City of Portland – Off Peak Period</b>						
City of Portland	529	40	246	21	148	10
Non-Equity Focus Areas	329	17	142	9	96	4
Equity Focus Areas	669	56	320	29	184	14
<b>East Multnomah County – Access to Jobs – Peak Period</b>						
East Multnomah County	1,089	67	523	30	293	20
Non-Equity Focus Areas	551	7	266	3	148	2
Equity Focus Areas	1,292	90	621	41	348	27

The one sub-region where the accessibility results is an outlier is Clackamas County. Accessibility results in Clackamas County varied in that some specific circumstances accessibility in non-equity focus areas increases more than equity focus areas. For example, accessibility to low and middle-wage jobs by transit during the peak travel period for non-equity focus areas saw greater increase in number of jobs accessible due to the 2024-2027 MTIP investments as compared to the equity focus areas. However, accessibility to low-wage jobs by driving during the peak travel period for equity focus areas increases slightly more than non-equity focus areas. Also interesting for the Clackamas County sub-region, the accessibility to jobs by transit decreases during the off-peak travel period, but non-equity focus areas tend to see a greater decrease of accessible jobs than equity focus areas. Nonetheless, the equity focus areas in Clackamas County start with a higher level of accessibility, therefore the slight decrease is not a significant impact. While the increases and decreases are not incredibly significant, the varied accessibility results may indicate a potential need to identify a combination of strategies – particularly different types of transit solutions – to address the transportation needs of marginalized communities living in Clackamas County. This will necessitate partner agencies to work creatively and collaboratively to be successful in serving the marginalized communities in Clackamas County.

### 3-20. Clackamas County – Accessibility to Jobs – Totals

	Change Between 2027 Build & No Build		2027 No Build		2027 Build	
	Driving	Transit	Driving	Transit	Driving	Transit
<b>All Jobs – Peak Period</b>						
Clackamas County	326	14	270,024	47,259	270,350	47,273
Non-Equity Focus Areas	321	23	285,490	30,417	285,810	30,440
Equity Focus Areas	329	10	262,386	55,576	262,715	55,586
<u>Low-Wage Jobs</u>						
Clackamas County	147	7	127,696	22,355	127,843	22,362
Non-Equity Focus Areas	145	11	134,869	14,383	135,015	14,395
Equity Focus Areas	148	5	124,153	26,291	124,301	26,296
<u>Middle-Wage Jobs</u>						
Clackamas County	94	3	74,348	12,992	74,442	12,995
Non-Equity Focus Areas	96	6	78,725	8,344	78,821	8,350
Equity Focus Areas	93	2	72,186	15,288	72,279	15,290
<b>All Jobs – Off Peak Period</b>						
Clackamas County	334	-12	344,855	47,999	345,189	47,987
Non-Equity Focus Areas	321	-19	368,358	30,498	368,679	30,479
Equity Focus Areas	340	-8	333,248	56,641	333,588	56,633
<u>Low-Wage Jobs</u>						
Clackamas County	162	-6	163,219	22,721	163,381	22,716
Non-Equity Focus Areas	154	-10	173,969	14,459	174,123	14,449
Equity Focus Areas	167	-3	157,910	26,801	158,076	26,798
<u>Middle-Wage Jobs</u>						
Clackamas County	89	-3	94,957	13,188	95,045	13,185
Non-Equity Focus Areas	93	-5	101,643	8,354	101,735	8,348
Equity Focus Areas	87	-2	91,655	15,575	91,741	15,573

Ultimately the analysis of the 2024-2027 MTIP contribution to access to jobs and community places reflects both progress and opportunities for additional work. Increased access, particularly by transit for equity focus areas, are a result of a reimagined service planning effort with input from local jurisdictions, essential workers, and marginalized communities working together to prioritize and focus service to best serve community needs. It also reflects adopted policy direction to focus and prioritize investments that advance equitable outcomes for marginalized communities. Nonetheless, the minimal performance results indicate further investment at the regional scale is necessary to be able to service marginalized communities. This includes larger scale capital transit projects like Tualatin Valley Highway high capacity transit, 82<sup>nd</sup> Avenue high capacity transit, and Southwest Corridor, two of which are in early planning phases.

In general, continuing to advance this policy direction and meet regional goals will take time and a combination of different efforts. This presents both challenge and opportunity for implementing the 2024-2027 MTIP investment program and future MTIP cycles.

## Addressing climate



Performance measure: Greenhouse gas emissions reduction – passenger vehicles and full fleet

**Table 3-21. Summary of Climate Performance Measures Results**

RTP Priority	Greenhouse Gas Emissions Reductions, Passenger Vehicles	Greenhouse Gas Emissions Reductions, Full Fleet	Active Transportation System Completeness
Climate	o	o	+/o

Key:

- o neutral or progress/regression is very minimal
- + trending towards the desired outcome for that priority
- trending away from the desired outcome for that priority
- +/o neutral or minimal progression with trajectory to trend toward desired outcome
- /o neutral or minimal regression with risk/trajectory to trend away from desired outcome

The 2024-2027 MTIP investment profile contributes to a small reduction of daily metric tons of greenhouse gas emissions and a very small reduction in greenhouse gas emissions per capita. The result is positive in recognizing that by 2027, the Portland metropolitan region is expected to grow to over 1.8 million people and over 1 million jobs. The increase in people and employment means an expected increase in travel activity, so the result of a slight reduction in emissions is progress and the region moving in the right direction. However, recent devastating weather events experienced by the region and observed throughout the United States and across the globe, stresses the urgency to address the climate crisis and curb greenhouse gas emissions dramatically in efforts to curb the increased number and degree of severe weather. Lastly, to note, the resulting analysis of greenhouse gas emissions cannot definitively answer the question as to whether and how far along the region is in meeting its Climate Smart Strategy emissions reduction targets. The MOVES emissions tool used for the 2024-2027 MTIP performance evaluation differs from the tool the State of Oregon used to set the region's Climate Smart Strategy emissions reduction target. Nonetheless, the information gathered can help assess general trajectory. The 2024-2027 MTIP is moving the region in the desired direction, but in the degree and trajectory is to be determined and there remains room for improvement.

With the 2024-2027 MTIP investments:

- Daily and annual greenhouse gas emissions decrease by volume (metric tons) and per person ever so slightly, but the impacts are fairly minimal.
- A slightly greater decrease in daily and annual greenhouse gas emissions by volume (metric tons) and per person is projected with the full fleet of vehicles (i.e. including freight trucks) compared to the passenger fleet and light duty vehicles.
- The decrease in daily and annual greenhouse gas emissions makes progress towards the region's goals, but accelerated implementation of the region's Climate Smart Strategy is necessary as the impacts of climate change through severe weather events become ever more present in the daily lives of the region's residents.

**Table 3-22. Greenhouse gas emissions reduction by volume and per capita**

	2027 No Build	2027 Build
<u>Full Vehicle Fleet</u>		
Daily Greenhouse Gas Emissions (Metric Tons)	12,651	12,559
Change daily greenhouse gas emissions from 2027 no build		-92

Percent change daily greenhouse gas emissions from 2027 no build		-0.6%
Annual Greenhouse Gas Emissions (Metric Tons) per capita	2.47	2.45
Change annual greenhouse gas emissions from 2027 no build per capita		-0.02
Percent change annual greenhouse gas emissions from 2027 no build per capita		-0.6%
<u>Passenger Vehicles</u>		
Daily Greenhouse Gas Emissions (Metric Tons)	9,392	9,325
Change daily greenhouse gas emissions from 2027 no build		-67
Percent change daily greenhouse gas emissions from 2027 no build		-0.6%
Annual Greenhouse Gas Emissions (Metric Tons) per capita	1.84	1.82
Change annual greenhouse gas emissions from 2027 no build per capita		-0.01
Percent change annual greenhouse gas emissions from 2027 no build per capita		-0.5%

The analysis of the 2024-2027 MTIP package of investments show daily and annual greenhouse gas emissions decreasing by volume (metric tons) and per person. The decreases are 92 daily metric tons of greenhouse gas emissions for the full fleet of vehicles and 67 daily metric tons for passenger and light duty vehicles (a subset of the full fleet). While overall, the decreases only represent .6 percent reduction, the result is positive when considering projected population growth and the associated economic activity which tends to generate increased greenhouse gas emissions.

Greenhouse gas emissions reductions from passenger vehicles and full fleet (i.e. heavy and medium duty trucks) both show promising trends. The decrease in emissions from the full fleet show that emissions from trucks are also trending downward. This is important because diesel trucks emit not only greenhouse gases but also other harmful air pollutants, including fine particulate matter, that cause of respiratory illnesses. Recent increased interventions in the passenger vehicle realm to promote fuel efficiency and economy are also contributing to greater reduction in emissions for passenger vehicles.

The minor and limited progress the 2024-2027 MTIP investment package makes in reducing greenhouse gas emissions and meeting the region's climate goals is not surprise, considering that over half of the investment profile is for preservation and maintenance. Additionally, the 2024-2027 MTIP is the first MTIP since the late 1990s without a high capacity transit project in design or construction. Major transit investments play a large role in the greenhouse gas emissions reductions because of how it effects travel behavior and attracts vehicle trips shifting to transit. Analysis conducted during the development of the Climate Smart Strategy indicates the strategy with the greatest greenhouse gas emissions benefit is building out the transit network and providing frequent transit service. The lack of a high capacity transit ready for inclusion in the 2024-2027 MTIP limits what might be expected in terms of greenhouse gas emissions reductions. The unusual profile of the 2024-2027 MTIP cycle as compared to previous MTIP cycles raised questions as to whether the capital investments made over the course of the next four years would yield progress towards the region's four transportation priorities, especially addressing climate change. But the analysis results indicate, even with limited capital investments, small investments in active transportation, safety, and system management combined with supportive programmatic investments – such as Safe Routes to School, Transit Oriented Development, and Regional Travel Options – can and continue to make progress towards the region's goals to address climate change and reduce

transportation-related greenhouse gas emissions, but to make a bigger impact much greater strategic investments are necessary.

## Addressing Safety

*Performance measures: Level of investment in safety projects by cost and percentage and subdivided by equity focus areas and high injury corridors.*

**Table 3-23. Summary of Safety Performance Measures Results**

RTP Priority	Level of Investment on Safety	Level of Investment on High Injury Corridors	Level of Investment on High Injury Corridors in Equity Focus Areas
Safety	-/o	+/o	+/o

Key:

- o neutral or progress/regression is very minimal
- + trending towards the desired outcome for that priority
- trending away from the desired outcome for that priority
- +/o neutral or minimal progression with trajectory to trend toward desired outcome
- /o neutral or minimal regression with risk/trajectory to trend away from desired outcome

With the 2024-2027 MTIP investments:

- The region's level of investment to address crashes that result in fatalities and serious injuries is a little over \$155 million. This is a bit of a decrease from the 2021-2024 MTIP, where closer to \$458 million was invested towards addressing crashes that result in fatalities and serious injuries.
- About one-third of the projects (37 of 108) focus on the safety of the system and reducing crashes that result in fatalities and serious injuries.
- Of the 37 safety projects, 27 projects address safety issues on the region's high injury corridors and intersections. A total of 24 of the 27 projects that address safety issues on the region's high injury corridors and intersections are in equity focus areas.
- A total of \$134 million (as compared to the \$440 million in the 2021-2024 MTIP) of the region's safety investment is directed in the region's equity focus areas. A little over \$118 million (down from 2021-2024 MTIP at \$385 million) is focused on the high injury corridors in the equity focus areas.

**Table. 3-24. Number of Safety Projects**

	All Projects*	Safety Projects	Safety Projects on High Injury Corridors (HIC)	Percent of Safety Projects out of MTIP Projects	Percent of Safety Projects on HIC out of MTIP Projects
Number of Projects	108	37	27	34%	25%
City of Portland	37	20	14	54%	38%
Urban Washington County	17	6	6	35%	35%
Urban Clackamas County	23	9	5	39%	22%

East Multnomah County	5	3	2	60%	40%
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*\*Some projects are in multiple sub-regions. Summing the subregions exceed total projects for the region.*

**Total programming:** The amount of funding anticipated to be spent in the 2024 through 2027 timeframe. Does not always reflect total cost if the project started prior to 2024 or expected to be completed after 2027.

**Total cost:** The entire amount spent to deliver the project

**Table 3-25. Level of Investment in Safety**

	All MTIP Investments	Safety Investment	Safety Investment on High Injury Corridors	Percent of Safety Investment out of MTIP Investment	Percent of Safety Investment on HIC out of MTIP Investment
Level of Investment	\$1,410,661,027	\$155,294,162	\$128,914,107	11%	9%
City of Portland	\$337,212,987	\$91,735,618	\$75,325,117	27%	22%
Urban Washington County	\$116,267,414	\$25,387,204	\$25,387,204	22%	22%
Urban Clackamas County	\$149,278,021	\$30,322,324	\$17,697,904	20%	12%
East Multnomah County	\$23,983,639	\$11,012,016	\$10,503,882	46%	44%

The 2024-2027 MTIP investments continues to emphasize investments that address crashes that result in fatalities and serious injuries. At a little over \$155 million of these investments account for a little over 10 percent of the 2024-2027 MTIP investment profile, whereas the safety projects (37 out of 108) accounts for a little over one-third (1/3) of the total number of evaluated projects as part of the analysis.<sup>15</sup> The majority of the region's investment in safety, \$128 million, is focused on addressing the crashes on the region's most problematic crash prone facilities – the high injury corridors and intersections. Across the four sub-regions – the City of Portland, Washington County, Clackamas County, and East Multnomah County – there was a fairly proportionate percentage of investment in safety between the City of Portland, Washington County, and Clackamas County. East Multnomah County was the outlier with the largest overall percentage investment to address crashes that result in fatalities and serious injuries. However, these numbers can appear skewed because of the limited number of projects within East Multnomah County.

The reduction of crashes that result in fatalities and serious injuries is a top priority expressed by marginalized communities as it relates to improvements in the transportation system. Crash history data shows people living in equity focus areas appear to suffer from a higher number of serious injury crashes and pedestrian fatalities.<sup>16</sup> Of the \$155 million in safety investments in the 2024-2027 MTIP, a little over \$134 million is focused in equity focus areas. Furthermore, a significant portion safety investment in

<sup>15</sup> 2024-2027 MTIP investment profile presented based on programming provided to partners as of January 2023.

<sup>16</sup> 2022 Annual Safety Performance Report, Metro.

equity focus areas, \$118 million, is directed to high injury corridors and intersections within those areas. This demonstrates a strong focus towards addressing transportation safety in the communities experiencing the greatest impact.

**Table 3-26. Level of investment in safety in equity focus areas**

	All MTIP Investments in EFAs	Safety Investment in EFAs	Safety Investment on High Injury Corridors in EFAs
Level of Investment	\$270,463,784	\$134,362,994	\$118,263,823
City of Portland	\$178,103,600	\$77,112,868	\$68,685,117
Urban Washington County	\$57,564,342	\$25,387,204	\$25,387,204
Urban Clackamas County	\$32,227,346	\$24,522,040	\$13,687,620
East Multnomah County	\$16,975,505	\$10,503,882	\$10,503,882

Nonetheless, the 2024-2027 MTIP level of investment towards safety is a decrease from the level of investment in safety in the 2021-2024 MTIP. The 2024-2027 MTIP invested \$458 million towards projects which reduce crashes that result in fatalities and serious injuries. Of that \$458 million, a total of \$385 million was focused on addressing the crashes on the region's high injury corridors and intersections. Additionally, the 2024-2027 MTIP saw a decrease in the amount of investment towards safety in equity focus areas. The 2021-2024 MTIP invested \$440 million in safety projects in equity focus areas, whereas the 2024-2027 MTIP invests \$134 million.

There are some reasons for the decreased amount, including the impact inflation in the delivery and cost estimation of projects. Additionally, the 2024-2027 MTIP is unique this cycle as over half of the \$1.4 billion is focused on preservation and maintenance of the existing system as compared to previous MTIP cycles where the investment level in preservation and maintenance tend to be around 35 to 40 percent. However, the overall decrease in the investment of safety is disappointing as the region continues to move in the opposite direction of its Vision Zero performance target.<sup>17</sup> As described in the region's annual safety performance report, the rate of crashes continues to increase. The annual average number of fatalities increased from 62 from 2011-2015 – the baseline year – to 93 from 2016-2020, an increase of 50 percent. The number of serious injuries increased from 457 to 512 in the same reporting years.<sup>18</sup> Despite a greater infusion of funding from the Bipartisan Infrastructure Law, the impact of inflation increasing the overall costs of projects and the many competing priorities (e.g. preservation and maintenance, addressing the active transportation gaps in the system) for the regional transportation system makes it challenging place the necessary large scale infrastructure investments to drastically change the trajectory of the crash trend. While limited, most safety investments in the 2024-2027 MTIP are directed at equity focus areas reflects a strategic effort that projects address safety issues that impact the most vulnerable communities.

<sup>17</sup> Vision Zero refers to the goal of reaching zero traffic-related deaths and/or serious injuries. The Portland metropolitan region adopted a performance target to reach zero traffic-related deaths and/or serious injuries by 2035.

<sup>18</sup> 2022 Annual safety performance report, Metro.

## Moving Ahead Towards Progress in the 21st Century (MAP-21) – Federal Performance Measures and Targets

In 2012, the transportation reauthorization known as Moving Ahead towards Progress in the 21st Century (MAP-21) was passed by Congress and ratified by President Obama. MAP-21 established eleven national performance measures for metropolitan planning organizations (MPOs), state departments of transportation, and transit agencies to assess and monitor the performance of the system. The following transportation reauthorizations, Fixing America's Surface Transportation (FAST) Act in 2015 and the Bipartisan Infrastructure Law (BIL) in 2021 continue the implementation of MAP-21 performance measures. As a result of MAP-21, MPOs, state DOTs, and transit agencies set performance targets associated with the eleven national performance measures in a cooperative and coordinated manner. Once performance targets were set MPOs, State DOT's, and transit agencies are expected to monitor and report on progress towards the performance targets for two and four year cycles depending on the performance metric.

### MAP-21 Performance Measures

- Safety
  - Fatalities and Serious Injuries
- Asset Management – Pavement
  - Percentage of pavements of the Interstate System in Good condition
  - Percentage of pavements of the Interstate System in Poor condition
  - Percentage of pavements of the non-Interstate NHS in Good condition
  - Percentage of pavements of the non-Interstate NHS in Poor condition
- Asset Management – Bridge
  - Percentage of NHS bridges classified as in Good condition
  - Percentage of NHS bridges classified as in Poor condition
- Asset Management – Transit
  - Rolling stock – Percent of revenue vehicles that have met or exceeded their useful life benchmark
  - Equipment – Percent of service vehicles that have met or exceeded their useful life benchmark
  - Facilities – Percent of facilities rated below 3 on the condition scale (1=Poor to 5=Excellent)
  - Infrastructure – Percent of track segments with performance restrictions
- National Highway System Performance
  - Percentage of person-miles traveled on the Interstate that are reliable
  - Percentage of person-miles traveled on the non-Interstate NHS that are reliable
- Freight Movement on the Interstate System
  - Truck Travel Time Reliability (TTTR) Index
- Congestion Mitigation and Air Quality
  - Total emission reductions for applicable criteria pollutants
  - Peak hour excessive delay
  - Percent of non-single occupancy vehicle travel

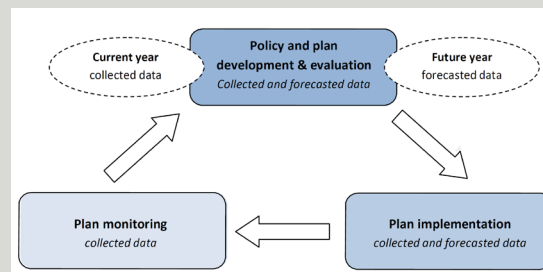
The Portland metropolitan region developed its MAP-21 performance targets in 2018 and the targets were adopted as part of the Regional Transportation Plan. Through subsequent coordination processes organized by ODOT in 2022, new targets were established for 2024. As part of the target development, the region collected data, established baselines for each measure, and coordinated with partners the Oregon Department of Transportation and the region's transit agencies – TriMet and SMART – to ensure targets were consistent and moving in the same direction. Monitoring of performance began for the suite of MAP-21 performance measures in 2019.<sup>19</sup>

## Discussion: How our regional system performs

In general, the region's near-term investments in the transportation system show mixed progress towards meeting the 2022 and/or 2024 federal performance targets. Several different factors have affected progress towards the federal performance targets this cycle, which include but not limited to the unusual circumstances of the global pandemic, rising inflation, and severe weather events. In areas where progress is being made, such as system reliability and freight travel, it shows guidance from the congestion management process as well as thoughtful and strategic investment across all parts of the system supports greater reliability on the system. Whereas there are clear areas the region is moving in the opposite direction. This includes the region's progress towards its Vision Zero target, where crashes resulting in fatalities and serious injuries continue to rise despite efforts. The 2024-2027 MTIP investment profile this cycle, with a large focus on preservation and maintenance projects, aims to make gains on the preservation and maintenance backlog and achieve the 2024 pavement and bridge condition performance target across the transportation system. While the remaining capital investments in the 2024-2027 MTIP reflect a range of investment priorities, including federal funding dedicated towards bicycle and pedestrian infrastructure on the state system, investments into electrification infrastructure, and redesigning or adding features that better address pedestrian safety on the most dangerous roadways. This array of investment is intended to contribute to reach the other federal performance targets.

The MAP-21 performance targets differ from the system performance assessment conducted on the MTIP investments to understand the performance of the region's transportation system. The MAP-21 federal performance measures require MPOs, state DOTs, and transit agencies to use observed and monitored data to measuring performance and set targets for the system. The observed data approach to performance differs from the system assessment approach which looks at projections of future impacts from investments.

**Figure 1. RTP performance measurement system**



<sup>19</sup> Due to the timing of when certain MAP-21 performance measures and targets were required to be set, monitoring for some performance targets, namely asset management and safety, began before 2019.

The largely preservation and maintenance focused investment profile represented in the 2024-2027 MTIP brings both benefits and challenges. The benefit includes the progress towards asset management goals and addressing the long-standing maintenance backlog. The challenge is that the large investment focus into preservation and maintenance leaves limited opportunity to make progress towards other MAP-21 performance areas. The limited remaining funding and the competing multiple priorities therefore limits the expectations on impact the 2024-2027 MTIP can make towards the other MAP-21 performance targets. A clear example of this is with safety, where crash data show a trend in the opposite trajectory the region's Vision Zero target. While a little over one-tenth (1/10) of the 2024-2027 MTIP investment is focused on addressing crashes and strategically invested to make the greatest impact, the investment level may still not be enough to slow or reverse the trend.

The 2024-2027 MTIP investments are aimed at making progress towards all the region's performance targets established by MAP-21, but the degree of progress with each MTIP cycle can greatly vary. Some MTIP cycles may heavily weigh meeting certain MAP-21 performance targets more than others based on awarded discretionary grants or an increase in the amount of specific formula fund program dollars. However, a four-year investment program, once allocated among different priorities, typically results in a small amount of dollars towards the types of projects that make progress towards the different individual MAP-21 performance targets. Essentially, the expectation of progress that can be made towards MAP-21 performance targets are limited with each MTIP cycle.

The 2024-2027 MTIP is the second metropolitan transportation improvement program subject to the MAP-21 performance target reporting and monitoring process. What was raised from the 2021-2024 MTIP reporting of the MAP-21 performance targets was the question of whether a balanced, limited progress approach towards all performance targets should continue or if an aggressive focused approach is necessary for certain targets. The profile of the 2024-2027 MTIP being weighted more towards preservation and maintenance at this time may provide insights in the next mid-performance period reporting for the MAP-21 performance targets.

The following sections look at each of the individual MAP-21 performance target areas. The regional targets are provided for each performance measure with the most recent performance reporting data. The section concludes with a discussion of the 2024-2027 MTIP investments progress towards 2022 and 2024 targets.<sup>20</sup>

## Asset management – Pavement

Table 3-27. Asset management – Pavement conditions

Asset Management – Pavement Condition*							
Performance measure	2018 Baseline	2020 Actual	2021 Actual	2022 Target	2024 Target	2024 Target achieved?	Better than baseline?
Percent of pavement on the Interstate System in good condition	46.5%	50.9%	not available	35%	45%	yes	yes
Percent of pavement on	0.8%	0.5%	not available	0.5%	0.5%	yes	yes

<sup>20</sup> Not all MAP-21 performance measures have targets set for 2024.



the Interstate System in poor condition							
Percent of pavement on the non-Interstate NHS in good condition	17.5%**	13.4%**	not available	32%**	14 or 15%	no	no
Percent of pavement on the non-Interstate NHS in poor condition	10.4%**	11.8%**	not available	25%**	10.8%	no	no

Source: Oregon Department of Transportation

\*\* ODOT changed the metrics for calculating percent of pavement on non-Interstate NHS in good and poor condition

The percentage of pavement on the Interstate Highway System in the Portland region classified in good condition increased from 46 percent in 2018 (new baseline) to 51 percent in 2020. The percentage of pavement on the Interstate Highway System in poor condition decreased slightly between 2018 and 2020 and remained less than one percent. For the new 2018 Baseline, ODOT changed the metrics for calculating percent of pavement the on non-Interstate NHS in good and poor condition, which reduced the percentage in good condition and increased the percentage in poor condition compared to the 2020 Mid-performance Report. The percentage of pavement on the non-Interstate National Highway System (NHS) in good condition decreased between 2018 and 2020, from 17.5 to 13.4 percent. The percentage of pavement on the non-Interstate National Highway System (NHS) in poor condition increased from 10.4 percent in 2018 to 11.8 percent in 2020.

Based on this data, two of the four pavement condition targets were achieved. The asset management performance targets achieved were the percent of pavement in good condition and in poor condition on the interstate system. The asset management performance targets for the percent of pavement in good condition and in poor condition on the non-interstate system were not achieved. Since establishing the baseline and first performance target for 2018, the region has met or exceeded its target for percentage of pavement in good condition and poor condition on the interstate system for all subsequent years. The reasons for meeting the asset management performance targets for the interstate system can be attributed to several reasons. First and likely the most impactful is that ODOT and the Portland region have a long standing policy around preserving and maintaining the existing transportation system. The Oregon Transportation Commission reaffirmed the “fix-it first” policy direction through the approval of its strategic action plan which continues policy direction to maintain the existing system first. Another reason pavement asset management performance targets for the interstate system have been met is because of criteria which restrict funding for or favors the interstate system. Some federal funding programs, like the Interstate Maintenance program is restricted funding for preservation and maintenance activities, while some ODOT funding programs allocate funds based on criteria that favor the interstate system (e.g. high volumes). While this supports preservation and maintenance upkeep on the interstate system, it also creates disadvantages on the maintenance and preservation needs of the non-interstate highway system. Lastly, as it pertains to pavement asset management, ODOT elected to

set targets that are less aggressive than those set for Oregon statewide. This is because in general, the Portland region's roadways and have a much higher usage than in the rest of the state and makes keeping up with the pavement conditions target very challenging when recognizing the myriad of competing transportation system needs, including the pavement asset management needs of the non-interstate system.

Nonetheless, the biggest driver towards the region's pavement asset management performance is due to the application of the "fix-it first" policy direction. That policy direction continues through 2024-2027 STIP revenue allocation strategy to funding programs which continues to provide the greatest amount of funding towards fixing existing assets. Funding for asset management was further bolstered by the infusion of funding from the Bipartisan Infrastructure Law (BIL). Additionally, the OTC also created new funding programs to support the comprehensive needs – including maintenance – of the state-owned district highways, which comprise the non-interstate highway system. The result, reflected in the 2024-2027 MTIP, is the ODOT investment split between preservation and maintenance versus capital in the Portland region totaling over \$218 million for preservation and maintenance and \$188 million for capital projects. The 2024-2027 MTIP also includes the state funding specifically dedicated for pavement and bridge conditions, which was passed by the Oregon legislature in 2017. With the additional funding, the region can expect to see further progress and likely continue to meet its pavement conditions performance targets for 2024 and beyond.

### Asset management – Bridge

Table 3-28. Asset management – Bridge

Asset Management – Bridge Condition *							
Performance measure	Regional 2017 Baseline	Regional 2020 Actual	Regional 2021 Actual	Regional 2022 Target	Regional 2024 Target	2024 Target achieved?	Better than baseline?
Percent of NHS bridges classified in good condition	6%	6%	6%	5%	5%	yes	same
Percent of NHS bridges classified in poor condition	1%	1%	1%	5%	1%	yes	same

Source: Oregon Department of Transportation

The percentage of national highway system (NHS) bridges in the Portland region classified in good condition remained at 6 percent in 2020 and 2021 and has not changed from the 2017 baseline. The percentage of NHS bridges classified in poor condition remained at 1 percent in 2020 and 2021.

Based on the 2017 baseline and 2021 actual data available on bridge condition, the region has made miniscule progress towards, but still managed to achieve the 2022 and 2024 targets for both bridge condition performance measures. In fact, the region's bridge condition has not budged despite investments into maintaining bridges for multiple MTIP cycles. In 2017 Oregon legislature passed a state transportation funding package that specifically dedicated local revenue for maintaining pavement and

bridge conditions, but even with the infusion of state funding as well as the increased funding from BIL, maintenance into bridges is very costly and resource intensive.

Like pavement asset management, the achievement of the bridge condition performance targets can likely be credited to both policy and setting realistic performance targets. As discussed in the pavement asset management conditions, ODOT elects to set targets that are less aggressive than those set for Oregon statewide. This is because in general, the Portland region's bridges and have a much higher usage. But the bridge conditions results are benefited by the state and the Portland region long standing policy around preserving and maintaining the existing transportation system. The Oregon Transportation Commission reaffirmed the “fix-it first” policy direction through the approval of its strategic action plan which continues policy direction to maintain the existing system first.

As for the 2024-2027 MTIP, the preservation and maintenance dominate investment profile continues to invest into the maintenance of existing bridges. Additionally, while not specifically reflected in the 2024-2027 MTIP at this time, one of the Portland region’s major projects – the Interstate Bridge Replacement – is in active development and likely to request amending into the 2024-2027 MTIP. The Interstate Bridge Project will replace the existing aging bridge with a seismically resilient modernized bridge connecting Oregon and Washington. The completion of this project will be a boost towards continuing to meet the bridge asset management performance target in 2024 and beyond.

## Safety

Table 3-29. Safety and crashes

Performance Measure	5-year rolling average			Target achieved?	Better than baseline?	On track to Vision Zero?
	2011-2015 Baseline	2016-2020 Target	2016-2020 Actual			
Number of fatalities	62	52	93	No	No	No
Fatalities per 100 million vehicle miles traveled	0.6	0.5	0.9	No	No	
Number of serious injuries	458	384	512	No	No	
Serious injuries per 100 million vehicle miles traveled	4.5	3.6	4.8	No	No	
Number of non-motorized fatalities and serious injuries	113	95	129	No	No	

Source: Oregon Department of Transportation

The region set ambitious safety targets in the 2018 Regional Transportation Plan: a 16 percent reduction in fatalities and serious injuries by 2020, a fifty percent reduction by 2025 and zero fatalities and serious injuries by 2035. To be on track to meet these goals, fatalities and serious injuries needed to decline nearly 29 percent and 43 percent respectively from the base year 2015 to the federal performance target reporting years 2022 and 2024. However, fatalities increased 50 percent, and serious injuries increased 12 percent.

The greater Portland region did not meet any of the five safety targets the region set for the federal transportation performance measures or improve over the baseline from 2015. Based on the results of the performance measures, the region is not on track for achieving its Vision Zero goal.

While data trends continue to show that the region is moving in the opposite direction for the five MAP-21 safety performance measures, the public awareness and the number of fatalities resulting from crashes in the region has increased the urgency to do more to prevent these fatalities. The 2024-2027 MTIP reflects investments that look to address aspects of the roadway to reduce crashes, particularly severe crashes that lead to serious injuries and fatalities.

In addition, both the prioritization criteria for allocating federal and state discretionary funding in the STIP and the Regional Flexible Funds reflect the significant emphasis on reducing crashes. In particular, the 2025-2027 regional flexible funds allocation prioritized those transportation investments in the system that included countermeasures on the region's high injury corridors or intersections. The allocation of

### Definition of a safety project

**Safety Project** - Has the primary purpose of reducing fatal and severe injury crashes or reducing crashes by addressing a documented safety problem at a documented high injury or high risk location with one or more proven safety countermeasures.

funds for the 2024-2027 STIP also saw a small infusion of funds dedicated towards safety, funded by the Bipartisan Infrastructure Law. Additionally, state funding from House Bill 2017, which earmarked a portion of revenues towards safety, was revised to be responsive towards an emergent safety issue. For example, under this revised framework, House Bill 2017 funding was used to respond to two fatal pedestrian-vehicle collisions at the same intersection on 82<sup>nd</sup> Avenue in Portland by immediately installing two new rectangular rapid flashing beacons at pedestrian intersections, digital speed feedback signs, and adding enhanced lighting, new signs and additional striping at four intersections in addition to lowering the speed limit near the crashes site. Roughly, \$155 million of the 2024-2027 MTIP is dedicated towards safety. While reducing crashes is predicated on numerous strategies, the diverse set of investments in the 2024-2027 MTIP continues to aim and get back on track towards the region's ambitious safety goal of Vision Zero and the metrics.

## System performance

Table 3-30. National Highway System performance targets

National Highway System Performance *							
Performance measure	2017 Baseline*	2018 Actual	2019 Actual	2020 Target	2022 Target	2020 Target achieved?	Better than baseline?
Percent of person-miles traveled on the Interstate System that are reliable	46%	47%	49%	43%	43%	yes	yes
Percent of person-miles traveled on the non-Interstate NHS that are reliable	72%	75%	77%	66%	66%	yes	yes

Source: National Performance Management Research Dataset (NPMRDS)

Table 3-31. Freight movement on the interstate system – Freight reliability targets

Freight Movement on the Interstate System – Freight Reliability Targets							
Performance measure	2017 Baseline*	2018 Actual	2019 Actual	2020 Target	2022 Target	2020 Target achieved?	Better than baseline?
Truck Travel Time Reliability (TTTR) Index	2.93	2.88	2.84	3.10	3.10	yes	yes

Source: National Performance Management Research Dataset (NPMRDS)

The percentage of person-miles traveled on the Interstate System in the region that are reliable was 46 percent in 2017 (baseline). That percentage increased to 47 percent in 2018 and 49 percent in 2019. The percentage of person-miles traveled on the non-Interstate NHS that are reliable was 72 percent in the 2017 baseline. That percentage increased to 75 percent in 2018 and 77 percent in 2019.

Based on the monitoring data, the region meets and exceeds the region’s MAP-21 person-miles traveled reliability system performance targets for 2020 and 2022. Not only are the percentage of person-miles traveled (on the Interstate and non-Interstate system) in the region that are reliable exceeding the 2020 and 2022 targets, but the trend from 2017 to 2019 shows an overall improvement in reliability.

The results of the monitoring data are not surprising, since the development of the 2017 baseline, the region has seen the opening of a couple of major roadway and transit capital investments, including the Interstate 5 south auxiliary lanes near Lower Boones Ferry Road, the Interstate 205 auxiliary lanes from Glen Jackson Bridge to Johnson Creek Boulevard, the Oregon 217 (OR 217) auxiliary lanes from Beaverton-Hillsdale Highway and Oregon 99 (OR99W), the Better Red project which extends the MAX red line to Hillsboro Airport and fixes a MAX bottleneck at the Gateway Transit Center, and the Division Transit frequent express bus project. These investments, included in previous MTIPs, were likely significant contributors to the percent of person-miles traveled on the interstate and non-interstate NHS that are reliable.

The region continues to make progress towards truck time reliability. The truck travel time reliability (TTTR) index was 2.93 within the region in the 2017 baseline. At the baseline, the amount of buffer time that was needed for a truck trip to arrive on time 19 out of 20 times was almost 3 times as long as a truck trip that needed no additional time to arrive on time 95 percent of the time. Monitoring data shows the TTTR index improves slightly to 2.88 in 2018 and 2.84 in 2019, which achieves the 2020 and 2022 targets of 3.10. While slight, the progress shown in the monitoring data for 2018 and 2019 is notable, recognizing the region continues to grow in population and employment. The increase in people and jobs in the region, combined with the global pandemic shifting patterns of shopping to online are factors which the region may expect to see a decrease performance in TTTR and movement in the opposite direction. But the diverse array of transportation investments made previously have managed to improve the TTTR index. Nonetheless, 2.84 continues to represent a significant amount of buffer time needed for freight reliability and presents a continuous opportunity to invest in an assortment of transportation strategies which support mobility for people and goods.

While not reflected at this time, the 2024-2027 MTIP has several major projects currently in development that are likely to make an impact on the reliability of the interstate and non-interstate NHS and make improvements to the TTTR index. These investments include the Interstate 5 Rose Quarter improvement project, Interstate Bridge Replacement project, I-205 widening, as well as tolling. The two tolling projects in addition to the Interstate Bridge Replacement project also including a toll, will likely shift the mode of some vehicle trips and open interstate and non-interstate NHS capacity for truck throughput.

## Air quality

The Portland metropolitan region reached the end of its second ten-year maintenance plan for carbon monoxide on October 2, 2017. As a result, starting on October 3, 2017, the region is in attainment status for all national ambient air quality standards. Subsequently, the Federal Highway Administration (FHWA) determined in October 2019, the Portland metropolitan region is not subject to reporting on the Congestion Mitigation and Air Quality federal performance measures and targets as a result of its attainment status.

## Transit Asset Management (TAM)

**Table 3-32. Transit Asset Management Targets**

Transit Asset Management Targets <sup>1</sup>									
Performance measure	2018 Baseline	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual	2023 Target
<b>TriMet Rolling Stock –</b> Percent of revenue vehicles that have met or exceeded their useful life benchmark (ULB)	15.3%	16.2%	18%	0.0%	5.9%	6.1%	5.8%	0%	0%
BU – Bus	9.0%	16.6%	45%	45.2%	45.2%	45.2%	43.2%	52.2%	60%
CU – Cutaway (used for LIFT para-transit)	0%	0%	18%	17.6%	17.6%	17.6%	17.6%	17.7%	17.7%
LR – Light rail vehicles	0%	0%	0%	0%	0%	0%	0%	0%	0%
RP – Commuter rail passenger coach	0%	0%	0%	0%	0%	0%	0%	0%	0%
RS – Commuter rail self- propelled passenger car	0%	0%	0%	0%	0%	0%	16.5%	23.8%	25.3% <sup>3</sup>
VN – Van (used for LIFT para-transit)									
<b>TriMet Equipment –</b> Percent of service vehicles that have met or exceeded their useful life benchmark (ULB)									
Automobiles	28.6%	28.6%	17%	28.6%	28.6%	28.6%	40%	25%	25%
Trucks and other rubber tire vehicles	34.4%	29.0%	23%	24.3%	24.3%	24.3%	27.8%	34.1%	25.3%
Steel wheel vehicles	30%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<b>TriMet Facilities –</b> Percent of facilities rated below 3 on the condition scale (1=Poor to 5=Excellent)									
Passenger/Parking facilities	1.03%	1.22%	1%	0.9%	0.7%	0.9%	0.6%	0.6%	0.7%
Administrative/Maintenance facilities	0%	0%	0%	0%	0%	0%	0%	0%	0%
<b>TriMet Infrastructure –</b> Percent of track segments with performance restrictions	4.7%	4.24%	4.0%	5.9%	5.0%	7.6%	5%	7.3%	7%
LR – light rail	3.0%	0.42%	3.0%	1.6%	3.0%	0.1%	3%	0%	3%
YR – Hybrid rail									
<b>SMART Rolling Stock –</b> Percent of revenue vehicles that have met or exceeded their useful life benchmark (ULB)	33%	35%	33%	43%	20%	N/A	25% <sup>2</sup>	N/A	N/A
BU – Bus				47%	32% <sup>2</sup>	N/A	38% <sup>2</sup>	N/A	N/A
CU – Cutaway Bus									
<b>SMART Equipment –</b> Percent of service vehicles that have met or exceeded their useful life benchmark (ULB)	20%	38%	20%	10%	12%	N/A	8% <sup>2</sup>	N/A	N/A
Automobiles				44%		N/A	45% <sup>2</sup>	N/A	N/A

Transit Asset Management Targets <sup>1</sup>									
Performance measure	2018 Baseline	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual	2023 Target
Truck and other rubber tire vehicles									
<b>SMART Facilities</b> – Percent of facilities rated below 3 on the condition scale (1=Poor to 5=Excellent)									
Passenger/Parking	0%	0%	0%	0%	0% <sup>2</sup>	0%	0% <sup>2</sup>	N/A	N/A
Administrative/Maintenance	0%	0%	0%	3%	1.5% <sup>2</sup>	0%	1.5% <sup>2</sup>	N/A	N/A
<b>Portland Streetcar Rolling Stock</b> – Percent of revenue vehicles rated below 2.5 on the condition scale (1=Poor to 5=Excellent)									
Streetcars	0%	0%	0%	2%	0%	2%	0%	N/A	N/A
Bogies	0%	0%	0%	0%	0%	0%	0%	N/A	N/A
<b>Portland Streetcar Equipment</b> – Percent of service vehicles that have met or exceeded their useful life benchmark (ULB)	40%	17%	0%	4%	0%	0%	0%	N/A	N/A
<b>Portland Streetcar Facilities</b> – Percent of facilities rated below 3 on the condition scale (1=Poor to 5=Excellent)	0%	0%	0%	0%	0%	0%	0%	N/A	N/A
<b>Portland Streetcar Infrastructure</b> – Percent of track mileage operating below design speed	0%	0%	<2%	0%	0%	0%	0%	N/A	N/A
<sup>1</sup> Each transit provider must update State of Good Repair targets annually and the agency's Transit Asset Management (TAM) Plan must be updated at least every 4 years covering a horizon period of at least 4 years. Performance measures and targets are monitored and reported in agency TAM Plans adopted by TriMet, C-TRAN, Ride Connection, SMART and Portland Streetcar. Reported are only those TAMs from TriMet, SMART, and Portland Streetcar as those are the agencies where investments get reflected in the MTIP <sup>2</sup> Ride Connection and SMART's performance measures and targets are monitored and reported in ODOT's Group TAM Plan – targets are statewide encompassing all small providers. <sup>3</sup> Additional vans will reach the useful life benchmark for the year covered by RY2023.									

The region's transit agencies continue to make progress towards their annual transit asset management (TAM) targets. Slightly different from the majority of the MAP-21 performance targets, the TAM performance targets are re-evaluated annually to determine and if necessary update or adjust their TAM targets.

In general, the region's transit agencies – TriMet, SMART, and City of Portland Streetcar – are making progress towards their TAM targets, but no single transit agency met all TAM targets set forth. As the largest transit service provider in the region, TriMet's performance on the TAM targets is vital because transit plays a significant role in the region's implementation strategy to achieve the Regional Transportation Plan goals. For previous TAM targets set for 2020, 2021 or 2022, TriMet has not been able



to meet all the individual targets across the four major categories: rolling stock, equipment, facilities, and infrastructure. In most cases, TriMet met many of the individual targets, but with each year the actual performance does not meet one or two. There is not a consistent pattern of where underperformance of the TAM target occurs. One year it is the rolling stock TAM targets not met, then in another year it is infrastructure, and in another year it is the equipment. For 2023, TriMet’s TAM targets are set to levels where TriMet views as likely achievable.

For the smaller transit providers, namely SMART and City of Portland Streetcar, TAM targets for 2020 are achieved by SMART, but missing performance data for 2021 and 2022 makes it difficult to determine at this time whether TAM targets have been met for subsequent years. The City of Portland Streetcar did not meet TAM performance targets set for rolling stock and equipment in 2020 and 2021, but the underperformance appears to be slight with an increase by 2-4 percent. Establishing TAM targets for 2022 and 2023 for the smaller transit providers do not appear to be applicable.

Nonetheless, the 2024-2027 MTIP package includes investments to address the asset conditions of the transit system. In total, approximately \$500 million is programmed in the four-year program across all transit agencies to address rolling stock, infrastructure, and facilities. This is an increase from the \$376 million from the 2021-2024 MTIP cycle. The 2024-2027 MTIP reflects the infusion of new revenues provided to transit agencies from the Bipartisan Infrastructure Law (BIL) which were dispersed through the Federal Transit Administration formula programs, several of which are restricted to preservation and maintenance activities. Transit agencies were particularly devastated by the onset and uncertainty of the global coronavirus pandemic and the various relief packages as well as the increased formula funding from BIL helped to balance funding across all different needs areas for transit agencies, including asset management, while also reimagining the role of transit in a world post pandemic.

### Transit Agency Safety Performance Targets (PTASPT)

Transit agencies that provide service in the Portland region reflect their Transit Safety performance and targets in their respective Public Transportation Agency Safety Plans (PTASPs) and provide them to Metro as part of meeting federal TPM requirements. Transit agencies are required to establish their targets and share them with their MPO and State by December 31, 2020. Transit safety measures from agencies’ PTASPs are provided below, along with the 2019 baseline performance, and 2020 and 2021 performance where available. Metro used this information to establish a baseline and set initial targets for transit safety performance, and incorporated references to regional transit safety performance targets and transit agency safety plans as part of the 2024-2027 MTIP.<sup>21</sup>

The smaller transit providers, namely SMART and City of Portland Streetcar, appear to meet the safety performance targets established for 2020 and 2021. The trend for the City of Portland Streetcar is particularly interesting in recognizing the streetcar shares the right-of-way with motor vehicles and therefore presents more opportunities for conflicts and safety incidents. However, the rate of safety events and injuries are trending downwards. In the case of injuries, the total and rate is trending below the 2019 baseline performance levels.

THE REMAINING DISCUSSION OF THE PUBLIC AGENCY SAFETY TARGETS TO BE COMPLETED AFTER PUBLIC COMMENT.

**Table 3-32. Transit Agency Safety Targets**

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<sup>21</sup> The 2024-2027 MTIP is the first to include the transit safety performance targets and reporting.

Transit Agency Safety Targets								
Performance measure	2019 Baseline		2020 Performance		2021 Target		2021 Performance	
	Total	Rate	Total	Rate	Total	Rate	Total	Rate
<b>TriMet Fatalities</b> – per 1 million VRM	1	0.1119	3	0.3384	0	0	7	0.7897
Commuter/Light Rail	1	0.0469	0	0	0	0	1	0.0455
Deviated/Fixed Route Bus	0	0	0	0	0	0	0	0
Demand Response								
<b>TriMet Injuries</b> – per 1 million VRM	113	12.6505	97	10.942	-- <sup>1</sup>	<1.9	66	7.4457
Commuter/Light Rail	111	5.2045	152	9	-- <sup>1</sup>	<1.9	120	5.4630
Deviated/Fixed Route Bus	13	1.8189	5	6.9198	-- <sup>1</sup>	<1.9	6	1.0865
Demand Response				0.9055				
<b>TriMet Safety Events</b> – per 1 million VRM	114	12.7625	111	12.522	-- <sup>2</sup>	<1.3	98	11.055
Commuter/Light Rail	112	5.2514	164	2	-- <sup>2</sup>	<2.6	141	7
Deviated/Fixed Route Bus	11	1.5391	4	7.4661	-- <sup>2</sup>	-- <sup>2</sup>	5	6.4190
Demand Response				0.7244				0.9055
<b>TriMet System Reliability</b> – rate of in-service vehicle failures (miles)***	N/A	120,234	N/A	27,905	N/A	>10,000	N/A	28,054
Commuter/Light Rail	(rate only)	31,000	(rate only)	8,912	(rate only)	00	(rate only)	10,698
Deviated/Fixed Route Bus		22,840		4,973		>15,000		2,435
Demand Response						00		
<b>SMART Fatalities</b> – per 100k VRM**	0	0	0	0	0	0	0	0
Deviated Fixed/Fixed Route Bus	0	0	0	0	0	0	0	0
Demand Response								
<b>SMART Injuries</b> – per 100k VRM	0	0	0	0	0	0	0	0
Deviated Fixed/Fixed Route Bus	0	0	0	0	0	0	0	0
Demand Response								
<b>SMART Safety Events</b> – per 100k VRM**	0	0	0	0	0	0	0	0
Deviated Fixed/Fixed Route Bus	0	0	0	0	0	0	0	0
Demand Response								
<b>SMART System Reliability</b> – rate of in-service vehicle failures (miles)***	N/A	21,324 <sup>8</sup>	N/A		N/A	21,324	N/A	
Deviated Fixed/Fixed Route Bus	(rate only)	14,206 <sup>8</sup>	(rate only)		(rate only)	4	(rate only)	
Demand Response						14,206		
<b>Portland Streetcar Fatalities</b> – per 100k VRM* (Rail)	0	0	0	0	0	0	0	0
<b>Portland Streetcar Injuries</b> – per 100k VRM* (Rail)	14	3.27	14	3.27	12	3.05	8	2.04

Transit Agency Safety Targets								
Performance measure	2019 Baseline		2020 Performance		2021 Target		2021 Performance	
	Total	Rate	Total	Rate	Total	Rate	Total	Rate
<b>Portland Streetcar Safety Events</b> – per 100k VRM* (Rail)	14	3.27	14	3.27	19	4.83	17	4.34
<b>Portland Streetcar System Reliability</b> – rate of in-service vehicle failures (miles)** (Rail)	N/A (rate only)	0.2933	N/A (rate only)	0.2933	N/A (rate only)	0.2933	N/A (rate only)	0.2361
<sup>1</sup> TriMet did not adopt performance targets for total injuries in its PTASP, but did adopt a target of less than 200 OSHA recordable injuries for employees. <sup>2</sup> TriMet did not adopt performance targets for total safety events in its PTASP. Instead the agency adopted target of less than 1.3 for light rail and less than 2.6 for bus per 100,00 miles. TriMet also adopted performance targets of less than 5.4 lost time employee injuries per 200,000 hours worked. <sup>3</sup> Ride Connection also sets a boarding and alighting injury target of less than 2.25. <sup>4</sup> Ride Connection also set workers' compensation claim targets of 0 for deviated fixed route bus and less than 1.5 for demand response service. <sup>5</sup> NEMT is a new program as of March 2020 with no historical data from the previous brokerage and only a few months of actual data that is heavily skewed by COVID-19. Ride Connection will adopt specific NEMT targets once adequate data has been compiled. In the interim, the NEMT targets are the same as those for demand response. <sup>8</sup> SMART used FY 2018 data as a baseline for system reliability performance setting. * VRM stands for Vehicle Revenue Miles. ** System reliability is defined by FTA as the mean distance between major mechanical failures—measured as revenue miles operated divided by the number of major mechanical failures.								



## CHAPTER 4: BUILDING THE 2024-2027 MTIP: FINANCIAL FORECASTING AND PROJECT AND PROGRAM SELECTION FOR FUNDING

A core part of the development of the 2024-2027 MTIP is the formation of the four year investment package. While the first year of the investment package (i.e. federal fiscal year 2021) overlaps with the current 2021-2024 MTIP, the process of deciding what transportation projects and programs to fund from federal fiscal years 2025 through 2027 can take upwards of two or three years to make the final decisions. The decision process, undertaken by each MTIP partner – Metro, ODOT, SMART, and TriMet – involves several steps, including:

- a financial analysis to determine the estimated funding available;
- a policy setting component to establish the criteria for the allocation of funding;
- a selection process;
- a public involvement component at various points and responding to public involvement; and
- a final action component to ratify the final decisions.

As summarized the following sections and detailed in the appendices, a financial analysis sets the stage for funding allocation discussions to determine the investments that make up the 2024-2027 MTIP. The revenue forecasts and project cost estimates are completed by each partner agency looking at its revenue streams, existing financial commitments and federal and/or state laws or guidance related to budgets and cost estimating. Projects are then programmed so that estimated project costs by project phase do not exceed forecasted revenues in any year. The description of the process and methods used to demonstrate fiscal constraint of project funding is in Chapter 5.

### Chapter sections

- Metro 2025-2027 Regional Flexible Funds
- ODOT Region 1: 2024-2027 State Transportation Improvement Program (STIP) funding allocation
- SMART annual budget process
- TriMet annual budget process
- TriMet Special Transportation Fund allocation (STF)

The section following discussion of the financial analysis describes the decision process each agency uses to prioritize and select transportation investments programmed in the 2024-2027 MTIP. For Metro and ODOT, the processes described primarily focuses on federal fiscal years 2025 through 2027, since the decision process for investments programmed for federal fiscal year 2024 (and prior years) is described in the 2021-2024 MTIP. For the transit agencies, the annual budget process described informs the financial analysis and decision process.

## **Metro 2025-2027 Regional Flexible Funds**

### **Financial analysis**

#### **Financial forecast**

Every Regional Flexible Fund allocation (RFFA) process begins with a forecast of funding available for distribution to projects and programs in the next cycle. A forecast of available funds must be made three to five years in advance of fund expenditures to allow the awarded agencies time to staff up, secure matching funds and enter into agreements with the Oregon Department of Transportation to incur costs legally that will be reimbursed by U.S. Department of Transportation. Thus, a tentative forecast for awarding federal fiscal years 2025-2027 regional flexible funds, was determined in September 2021 in efforts to inform and adopt the 2025-2027 RFFA program direction.

To begin forecasting funding available Metro staff worked with ODOT finance staff and other Oregon MPOs in the transportation improvement program (TIP) coordinators committee to agree cooperatively on a forecast methodology for the federal funding programs applicable to the MPOs. These include the Surface Transportation Block Grant (STBG) – including the Transportation Alternatives (TA) Program set-aside, and the Congestion Mitigation – Air Quality (CMAQ) funding programs. The committee agreed, consistent with the ODOT forecast, to use a limitation rate of 93 percent of the authorization amount for all years that have approved federal authority, through federal fiscal year 2020. Initially since fiscal years 2025 through 2027 were beyond the FAST Act authorization, a compounding 2.2 percent growth rate to the federal fiscal year 2020 limitation amount is assumed. This growth rate is consistent with historical trends of growth of federal transportation funds. This cooperative process was undertaken prior to November 2021, where the revenue forecast became further clarified.

Following the cooperative revenue forecasting assumption process with ODOT and the Oregon MPOs, Metro applied an approach which took into account historical trends in funding levels from previous transportation reauthorizations and also using initial information about the components of BIL being discussed publicly. Historical precedent of each federal transportation reauthorization resulted in an increase in federal transportation revenues, so Metro staff began with the initial assumption that the historical trend in transportation revenues would continue with future legislation to replace the current authorization bill at the time. Following historical trends, Metro then incorporated information being reported on active discussions suggesting reauthorization would increase transportation funding at levels higher than previous trends. The pre-BIL assumption, which Metro programming staff called a “moderate growth forecast” reflected the amount of funds that would come to region through the federal formula funding programs based on the Senate Environment and Public Works (EPW) Committee Authorization bill, which provided an initial increase of seven percent in the first year of authorization (FFY 2022) and a 2.2 percent increase in each subsequent year to reflect typical growth of funds through the period of the authorization bill. This moderate growth forecast was discussed with TPAC in spring 2021 and received a general “thumbs up” to proceed with this approach. Utilizing this methodology, the initial 2025-2027 RFFA forecast was a total of \$143.98 million to be available in the years 2024 through 2027 for allocation

to new projects. In applying the adopted 2025-2027 RFFA program direction to allocate in a Step 1 and Step 2 framework (described in the policy direction section) approximately \$41 million was calculated to be available for capital project funding for the competitive Step 2 allocation process in the initial revenue forecast.

In 2020 Congress and President Biden began discussions and negotiations for the transportation reauthorization for federal fiscal years 2022 and beyond. An extension of the Fixing America's Surface Transportation Act (FAST ACT) was the transportation authorization bill in effect at the time, but set to expire in September 2021. Negotiations were agreed to in autumn 2021 and President Biden signed into law the Bipartisan Infrastructure Law (BIL) and the Infrastructure Investment Jobs Act (IIJA) in November 2021. Following, the passage of BIL, President Biden billed the new law as a "once in a generation" investment in infrastructure, including transportation infrastructure and the largest investment in public transit. The significant increased investment and having annual estimates through federal fiscal year 2026 warranted returning to update the 2025-2027 RFFA funding forecast. Because the Metro region had incorporated a potential increase in formula funding levels from a new transportation reauthorization in the estimate used for the 2025-2027 RFFA program direction, the revised estimate for the 2025-2027 RFFA Step 2 solicitation was not a dramatic increase: from \$41 to \$47 million. Also unique to the 2025-2027 RFFA, Metro took the opportunity to concurrently run a solicitation with the 2019 voter approved Metro Parks and Nature funding measure. As a result, an additional \$20 million in local funding was made available for regional trails projects that often seek federal regional flexible funds. Trails projects that meet RFFA eligibility requirements may be funded through either or both sources of available funding.

The BIL also created a new formula funding program for Metro as the MPO of the greater Portland region: the Carbon Reduction Program. Metro worked with ODOT finance staff to forecast the amount of funding to be made available through this program to both ODOT and the large MPOs (TMA MPOs) in the state. While the BIL provided new funding authority for this formula program in FFYs 2022-2026, funding was not actually available until after the subsequent appropriations bill for FFY 2022. Federal interim guidance for this new program also took time to be developed and released. So while the increased revenues in the existing formula programs of STBG, TAP and CMAQ were able to be incorporated into the RFFA process already underway, the region decided to wait and conduct a separate allocation process for the new Carbon Reduction Program funds.

Metro and ODOT worked to forecast approximately \$18.8 million of CRP funds are available to the region over the federal fiscal years 2022 through 2026 – the life of the current authorization bill. ODOT will also administer an allocation of CRP funds both to other smaller urban areas and to a statewide allocation. At this time, Metro will not allocate CRP funds for federal fiscal year 2027, as is being done for other federal fund types, due to the uncertainty of availability of these funds beyond the life of the current authorization bill.

### **Estimating project costs**

Agencies that apply for regional flexible funds estimate and manage their project costs, with review and approval by Metro. To establish realistic project budgets for any project with a right-of-way acquisition or construction phase, applicants are required to submit a cost estimate performed by a certified engineer. Applicants were instructed to inflate costs to year of expenditure dollars per their requested project schedule. Applicants were provided information regarding recent inflationary trends and requested to take those into account when estimating project costs and funding needs.

Similar to the 2022-2024 RFFA cycle, Metro hired a project management consulting firm with extensive experience in delivering federal aid projects to work with ODOT and Metro staff to review project

applications and assess them for risks related to costs, potential schedule delays, and missing project scope elements that may be needed to successfully deliver the project. The risk assessment was shared with project applicants prior to project selection so that applicants could modify their application to address identified risks if the applicant chose. A summary of the risk assessment was also provided to inform project selection, to help decision makers understand the level of risk associated with selecting a particular project and to adopt conditions of approval of funding that mitigate risks.

Once a project is awarded funds, the agency administering the project is responsible for implementing the scope of the project applied for within budget. Cost overruns must be covered by the agency, or the agency must apply for additional funds or request approval for a reduction in project scope.

## **Policy and program direction for funding allocation**

The 2025-2027 RFFA began with a discussion of the program direction in February 2021 to ensure regional funds continue to align with updated Regional Transportation Plan (RTP) policy direction, respond to current and anticipated system needs, and maintain consistency with previously adopted regional intent. Starting with input received through the 2022-2024 RFFA retrospective, Metro staff conducted a multi-month process to discuss with TPAC, JPACT, regional decision-makers and stakeholders potential updates to the 2025-2027 RFFA program direction. The thorough discussion led to several key changes in the 2025-2027 RFFA program direction. The 2025-2027 RFFA program direction was adopted by the JPACT and the Metro Council in September 2021.

The 2025-2027 RFFA program direction describes the region's intent for investing the regional flexible funds. The program direction continues to direct the region to invest in a manner consistent with the policy outcomes and investment priorities as defined in the adopted 2018 Regional Transportation Plan (RTP) , which was adopted utilizing performance based planning and the regional Congestion Management Process, as well as extensive public outreach. The RTP investment priorities are equity, safety, climate and mobility. The program direction also includes the regional transportation finance approach in use since 2009.<sup>1</sup> In addition to the direction to invest in the four 2018 RTP objectives, JPACT and Metro Council in policy discussions reaffirmed the same two-step process continue in the 2025-2027 RFFA. The existing two-step framework has been used to award funding since the 2012-2013 RFFA cycle and included the following:

- Step 1 continued the region's commitment to repayment of bonds used to develop and construct high-capacity transit and active transportation projects. It also continued investments in region-wide programs to fund system and demand management activities and to invest in transit-oriented development projects near high-capacity transit lines. These investments respond to various federal, state and regional obligations and commitments to manage congestion, improve air quality and plan for future growth throughout the region.
- Step 2 focused funding on capital projects as an important means of ensuring the vision defined in the RTP comes to fruition. Over the years, these funds have been invested in many local transformational projects throughout the region. Continuing to provide funding for local jurisdiction projects that support the four RTP investment priorities is a key component of achieving the region's vision and goals.

However, JPACT and the Metro Council provided direction to revise the Step 2 process. The region's decision-makers supported two key adjustments to the existing Step 2 framework. These included:

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<sup>1</sup> See Appendix II for the 2025-2027 RFFA Program Direction

- Remove the existing RFFA project mode-topic specific funding categories (*active transportation* and *freight*) and create a single funding category for application. Experience demonstrated that through thoughtful planning and design, the region can make investments that achieve multiple positive outcomes crossing over the different funding categories. As a result, the Step 2 investment nominations were evaluated against criteria related to the four 2018 RTP priority areas which are not travel mode specific.
- The recognition of economic benefits as part of the criteria to evaluate 2025-2027 RFFA Step 2 candidates. The abrupt impact of the COVID-19 pandemic highlighted the economic vulnerability of many communities, families, and workers throughout the region. The 2018 RTP policies identified the importance of the regional transportation system in supporting a healthy, growing economy, but did not go so far to emphasize support for the economy as a near-term funding priority. In recognition and in response to what was collectively experienced in 2020, regional decision-makers felt a need to identify economic benefit as an important criteria, it would be done within the framework of the adopted priority investment areas of equity, safety, climate and mobility.

In addition to the modifications to the Step 2 portion of the 2025-2027 RFFA, a new and unique element was the coordination of the 2025-2027 RFFA Step 2 project application and evaluation process with the allocation of Metro's 2019 Parks and Nature (P&N) bond measure funding for trail projects. Previous cycles of RFFA funded many trails projects and they are a critical part of the region's active transportation network. The significant overlap with the purpose and intent of the P&N bond measure funding dedicated for trails and the 2025-2027 RFFA Step 2 presented an opportunity to streamline and leverage efforts. By using a single application process, local agencies were able to coordinate and streamline their project funding requests. While the Metro Council adopted separate criteria and objectives for the P&N bond measure trails funding allocation, those criteria largely aligned with the 2018 RTP priorities criteria.

The solicitation process for the 2025-2027 RFFA Step 2 funding awards began in November 2021 and was completed in October 2022. During the call for projects that opened in November 2021 and closed in February 2022, 16 jurisdictions submitted a total of 29 applications which requested more than \$115 million in funding out of the \$67 million available. In efforts to have a well-informed allocation process, the following components were part of the deliberation for the final allocation.

- A technical evaluation using the criteria and performance measures which align to the 2018 RTP priorities – safety, equity, climate, and mobility.
- Federal and state requirements and regional directives from the 2025-2027 RFFA program direction.
- A risk assessment of the projects relative to potential issues that could affect ability to deliver the project as described in the application.
- Prioritization themes to emerge through the public comment period.
- Statements of priority as provided by each of the county coordinating committees and the City of Portland upon considering the technical evaluation and public comments.

The results and information from these components in addition to the information from the capital project applications helped to inform a set of staff recommended scenarios to support the discussion in creating the final recommended Regional Flexible Fund grant award package and the Parks and Nature trails bond awards.

Based on the multiple pieces of information to help facilitate the trade-off discussion, Metro staff developed a baseline allocation scenario, centered around advancing the four RTP outcomes, but with a



particular emphasis on safety and equity. Additional scenarios were modifications to the baseline. Regional decision-makers were provided the information for each component and deliberated over the staff recommended allocation scenarios over the course of in August with the final recommendation completed in October 2022.

The allocation of Carbon Reduction Funds is still underway. Metro is proposing that the previously adopted Climate Smart Strategy serve as the policy foundation and guidance for the allocation of these funds. This strategy meets the federal guidance for adoption of a regional carbon reduction plan that will be integrated with the state plan for carbon reduction as required by BIL. ODOT is also utilizing their previously adopted Carbon Reduction Strategy as the basis for meeting the federal planning requirements for the program.

Allocation scenarios consistent with the Climate Smart Strategy and the Regional Transportation Plan and the RFFA Program Direction are being created for consideration and final adoption by summer of 2023. It is anticipated that the final allocation of funds to projects will be amended into the 2024-27 MTIP after the allocation decision. This public review draft has programmed a “placeholder” revenue bucket of the forecasted \$18.8 million of CRP funding to demonstrate these available revenues that will be allocated to specific projects and programmed in the MTIP at a later date.

## **Public involvement**

In previous RFFA cycles, public involvement activities took place at two key steps in the process: 1) during the development of the program direction and setting the criteria for the allocation; and 2) after transportation projects and programs had been nominated for funding.

Because the 2025-27 RFFA program direction was to utilize the investment priority policies of the recently adopted Regional Transportation Plan, which included extensive input gathered throughout its development and adoption process, a formal public comment period was not held during the RFFA program direction development and adoption process. However, opportunities for comment on the program direction were provided as a part of the public meetings of TPAC, JPACT and the Metro Council when considering and adopting the Program Direction update.

Following the technical evaluation and project readiness review of the Step 2 applications, Metro held a public comment period from May 20 to June 21, 2022 to gather the region’s residents input to help decide how an estimated \$67.3 million in Regional Flexible Funds and Parks and Nature bonds should be spent on projects that will help make the region’s transportation system more equitable, safer, cleaner and more reliable. Input was gathered primarily via an online interactive comment tool, which was also translated into five additional languages: Spanish, Vietnamese, Chinese, Korean and Russian. Additionally, to increase the visibility of the public comment period, Metro ran Facebook ads in English Spanish, Vietnamese, Chinese, Korean and Russian. The tool provided information on the 29 projects under consideration, and respondents were able to indicate their level of support for any or all the projects. Input was also received via email, postal mail, and phone calls.

In total, 1,798 comments were gathered through the public comment tool. An additional 50 emailed comments, 28 formal comment letters, and one phone call providing comment on two projects were also gathered during the month-long comment period. The public input was used to shape the staff recommended allocation scenarios and the final project selection, by illustrating through percentages the relative support each project had received.

## **Final allocation outcome**

The 2025-2027 RFFA was completed in October 2022 with the adoption of the Step 1 a package of programmatic and high capacity bond repayment as well as Step 2 capital transportation investments. The combined allocation total of \$152 million and invests across multiple programs and projects focused on reducing crashes, addressing transportation disparities for marginalized communities, reducing greenhouse gas emissions, managing travel demand, and provide economic benefits for communities. The 2025-2027 RFFA is broken down as a little over \$105 million was directed to bond commitments, regional planning and programmatic investments through Step 1 of the RFFA framework. Step 2 was directed toward capital projects and totaled a little more than \$47 million.

Further detail on the 2025-2027 RFFA can be found in Appendix II.

# ODOT Region 1: 2024-2027 State Transportation Improvement Program (STIP) funding allocation

## Financial analysis

### Financial forecast

ODOT forecasts revenues available from their federal and state fund sources, as well as revenue sources that they are required or choose to pass through to other transportation agencies for the 2024-2027 State Transportation Improvement Program (STIP) period. Sources of available funding include federal, state, local, and other transportation funds. The statewide forecast of funds available for transportation projects and programs during the time period of the 2024-2027 STIP is led by the state Finance and Budget Divisions, Statewide Investments Section of the ODOT.

The financial forecast for the 2024-2027 STIP was initially developed over the course of six months between July 2020 and completing the process in December 2020. During the six month period, ODOT staff lead a discussion with the Oregon Transportation Commission (OTC) outlining historical trends in federal and state revenues, the various transportation needs of the state-owned transportation system, and other factors like commitments to satisfy an Americans with Disabilities Act (ADA) legal settlement. With the background context, ODOT staff develop projected revenues for federal fiscal years 2025 through 2027.<sup>2</sup> The state project revenue levels were based on current state legislation, House Bill 2017. The federal projected revenue levels were based on the current transportation authorization at the time – an extension of the Fixing America’s Surface Transportation Act (FAST Act). Recognizing the FAST Act was set to expire in September 2021 and the revenue forecast were for federal fiscal years beyond the current transportation authorization, ODOT staff recommended the OTC employ a previously used practice when no federal authorization bill is in place, a ten percent reduction assumed from current year levels to federal funding across all its funding program types for all STIP years. Therefore the initial 2024-2027 STIP forecast assumed a ten percent reduction for federal fiscal years 2025 through 2027.<sup>3</sup> The contingent hold back of ten percent of federal revenues is not assigned to a specific funding allocation program, but if funding levels are anticipated to come in greater than projected, then ODOT engages the OTC on allocation scenarios.

Even with the assumed reduction of federal funds, the initial forecast was an estimated at over \$2 billion statewide to allocate across ODOT’s different funding programs. The initial statewide estimate for the 2024-2027 STIP was able to provide a framework for ODOT staff to work with the OTC to assign forecasted available funding to their various funding allocation programs. The funding allocation programs each have distinct policy objectives and allocation processes, also approved by the OTC, that are used to select projects or programs to receive funds. The detailed policy objectives and selection processes of the funding programs must be consistent with the legal and policy restrictions associated with the revenue sources that will be used to fund them. MPOs participated in this portion of the ODOT process by providing comments to the OTC as they consider the options of fund levels to assign to different fund programs and categories. In the end the OTC elected to continue the funding category framework utilized in the 2021-2024 STIP with slight modifications. The funding category framework is described below.

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<sup>2</sup> Revenues for federal fiscal years 2024 were previously allocated in the 2021-2024 STIP development.

<sup>3</sup> Ibid.

The OTC allocated funding among the following major categories:

- **Fix-It** programs fund projects that fix or preserve the state’s transportation system, including bridges, pavement, culverts, traffic signals, and others. ODOT uses data about the conditions of assets to choose the highest priority projects. In recent STIPs the Commission has allocated most funding to Fix-It programs. For fiscal years 2025-2027, the allocated total is \$827 million.
- **Enhance Highway** programs fund projects that enhance or expand the transportation system. In this STIP cycle, a small competitive allocation was created, but would be limited to the state-owned system and at least 30 percent of the funding would need to be in the rural area. Additional partial funding from the Enhanced Highway funding program would need to be allocated to completing projects earmarked from House Bill 2017. For fiscal years 2025-2027 the allocated total is \$175 million.
- **Safety** programs reduce deaths and injuries on Oregon’s roads. This includes the All Roads Transportation Safety program, which selects projects through a data-driven process to ensure resources have maximum impact on improving the safety of Oregon’s state highways and local roads. For fiscal years 2025-2027 the allocated total is \$147 million.
- **Public and Active Transportation** programs fund bicycle and pedestrian projects and public transportation. A small new funding program was created focused on addressing pedestrian and bicycle gaps and deficiencies on state-owned district highways. For fiscal years 2025-2027 the allocated total is \$255 million.
- **Americans with Disabilities Curb Ramps** is a standalone funding program aimed at addressing the requirements, including the installation of curb ramps at intersections on ODOT owned facilities, set forward by ODOT’s settlement agreement with Disability Rights Oregon. For fiscal years 2025-2027 the allocated total is \$170 million.
- **Local government** programs direct funding to local governments so they can fund priority projects. For fiscal years 2025-2027 the allocated total is \$405 million.

Following President Biden signing into law the Bipartisan Infrastructure Law (BIL) in November 2021, ODOT staff returned to the OTC to update the revenue forecast for federal fiscal years 2022 through 2026. The BIL dramatically increased the amount of funding to existing transportation funding programs and created several new funding programs. The majority of the BIL funding was distributed to states through formulas based on the specific funding program. For ODOT this meant an additional \$1.2 billion in federal funding for highway programs over the five years of the bill, a 38 percent increase over the prior authorization. The new BIL formula funding designated much of the new dollars received by ODOT for specific purposes (bridges, resilience, carbon reduction, public transportation etc.). Nonetheless, approximately \$400 million came in the form of flexible highway program funds available for a variety of purposes. Over the course of January through March 2022, the OTC was provided a set of scenarios to allocate the \$400 million in flexible funding to the different state administered funding programs, similarly discussed in late 2020.

The OTC made its updated allocation of forecasted revenues for federal fiscal years 2025 through 2027 to the ODOT funding programs in late March 2022. A description of the policy direction from second allocation is described in the policy direction section. Since the BIL included a transportation authorization which applied through federal fiscal year 2026, the application of the 10 percent reduction of federal revenues on federal fiscal years beyond a transportation authorization was readjusted and only

applied to federal fiscal year 2027. In total, the updated 2024-2027 STIP statewide revenue forecast is over \$3.3 billion.

With the updated 2024-2027 STIP revenue forecast, several new state funding programs were created while several the existing funding programs received additional funding.<sup>4</sup>

The project selection process for ODOT funding allocation programs is administered at either the statewide level or the ODOT region level, depending on the allocation program. To help refine the 2024-2027 STIP revenue forecast to the Portland Metropolitan region, Metro implemented a 2024-2027 MTIP revenue forecast exercise, once prior and once after the enactment of BIL. Utilizing the information from the cooperative funding forecast with MPOs, information provided through the federal transportation reauthorization, and the allocation of forecasted funding available to the different funding programs, and the specific details about ODOT's individual funding programs allocation and administration process, Metro and ODOT were able to develop a rough estimate of ODOT administered funding that could be allocated to the Metro region. This was completed prior to any formal project or program solicitation or selection processes conducted by ODOT, but intended to provide an early estimate of investment into the Portland region's transportation system in the policy development process. This information provided context for communicating MPO policy priorities to ODOT in allocating ODOT administered funds.

### Estimating project costs

ODOT technical staff develops cost estimates by reviewing the project scope and applying engineering and financial assumptions based on the various work elements associated with the project. Using current financial and engineering information, costs are developed to determine project design, right-of-way acquisition, construction, contingencies and engineering estimates.

Estimating project costs became particularly challenging in the development of the 2024-2027 STIP. The impacts of the global coronavirus pandemic created supply chain conditions which increased the costs of transportation materials. The supply chain issues also contributed to the broader rise of inflation to emerge between 2020 through 2023. The sharp increase costs extended beyond contingencies factored into the completion of the design of projects. ODOT has worked to address the increase in project costs in using information from revised project scoping of current projects and incorporating the projects programmed in the 2024-2027 STIP. Additionally, for the 2024-2027 STIP, ODOT has employed a programming technique where capital projects for certain funding programs, such as the state bridge program and the pedestrian-bicycle strategic program, are only programmed through the right-of-way phase and a separate construction funding bucket is programmed. The intentions are to provide flexibility because of rapidly changing construction cost estimates and attempting to reduce the number of project amendments adjusting the construction phase programming to STIP and MTIP.

### Policy direction and criteria

In July 2020, the OTC accepted the update to the 2020 Investment Strategy. The Investment Strategy purpose, initially developed in 2017, is to facilitate the Commission's role in directing investments in the transportation system. The updated Investment Strategy ensures the Commission's investment decisions are informed by adopted transportation policies, data, measures of needs and gaps of the transportation system, transportation trends (e.g. technology, climate change), and potential impacts. The Investment

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<sup>4</sup> Some of the new state funding programs were dictated by the restrictions and requirements of new funding programs created by the Bipartisan Infrastructure Law.

Strategy was used as a starting point for the discussion to allocate forecasted funding allocation for the 2024-2027 Statewide Transportation Improvement Program (STIP).

Additionally, in October 2020, the OTC adopted a Strategic Action Plan (SAP) to prioritize and guide ODOT’s decision-making around investments and create an accountability structure for progress reporting. The SAP is organized by three strategic priorities—equity, modern transportation system, and sustainable and reliable funding—and fifteen strategic goals that further specify implementation the three strategic priorities. These priorities and goals informed the level of forecasted funding assigned to the funding categories and programs for further allocation for federal fiscal years 2025 through 2027.

During the deliberations to allocate forecasted revenues for the 2024-2027 STIP development, ODOT staff presented different funding scenarios using the framework of funding categories and programs outlined in the 2021-2024 STIP. To assist the OTC deliberations, each funding scenario was presented with the analysis results of potential outcomes and tradeoffs for key goals. The goal areas were extrapolated from the OTC’s approved Strategic Action Plan, Investment Strategy and requirements set by Executive Order 20-04, which requires considering greenhouse gas (GHG) emissions when making STIP decisions. The goals included congestion relief, multi-modal mobility, social equity, safety, climate change mitigation, climate change adaptation/resilience, and state of good repair.

After deliberations by members of the OTC, a funding allocation was adopted in December 2020, which largely kept the same 2021-2024 STIP funding categories and programs framework. Of the changes, some new funding programs were created, and some funding programs revised program criteria. The allocation of forecasted revenues from the 2024-2027 STIP reflects the following direction:

- Desire to increase funding for public and active transportation programs to address equity, climate change, and multimodal mobility.
- Desire to have some Enhance Highway funding beyond projects named in HB 2017.
- Continue to emphasize maintenance and preservation to avoid accelerating bridge and pavement deterioration.

After several hybrid scenarios were discussed, the OTC used the SAP, investment strategy, and public feedback to land on the following allocation in December 2020:

**Table 4-1. 2024-2027 STIP Allocation**

Category	Amount
Fix-it*	\$800,000,000
Enhance Highway**	\$175,000,000
Safety	\$147,000,000
Public and Active Transportation	\$255,000,000
Local Program	\$404,500,000
ADA Curb Ramps	\$170,000,000
Other Functions	\$161,410,568
<b>Total</b>	<b>\$2,112,910,568</b>

\*After factoring in borrowing \$120 million to cover ADA projects in 2021-2024 STIP.

\*\*All scenarios include \$110 million for projects named by the Legislature in HB 2017 with the remainder available for an Enhance Highway discretionary program.

Following the OTC approved the allocation of \$2.1 billion in funding in the 2024-2027 Statewide Transportation Improvement Program (STIP), ODOT staff proposed small modifications to the different

funding programs nestled within the broader funding categories. In particular, the public and active transportation funding category saw the creation of a new funding program to address a specific transportation need prevalent throughout Oregon, addressing the active transportation gaps on the state-owned district highways. This new funding program creation was aided by the significant increase in funding the OTC elected to place towards public and active transportation and because of low performance results of the 2021-2024 STIP towards the SAP goals of multimodal mobility, social equity, and climate change mitigation.

To increase the amount of funding available for public and active transportation in the 2024-2027 STIP, the OTC chose to decrease funding towards enhancements to the highway system. Funding for enhancements to the highway system was further limited by a need to use some projected revenues from the 2024-2027 STIP allocated to the enhance highway program to complete earmarked highway projects from House Bill 2017.

Additionally, despite a slight reduction of funding towards preservation and maintenance in the 2024-2027 STIP cycle, the Commission's approved allocation directs most discretionary funding to Fix-It programs that preserve roads, bridges, and other assets.<sup>5</sup> However, further reductions were placed on the Fix-It funding programs due to requirements set by a 2016 legal settlement agreement between ODOT and the Association of Oregon Centers for Independent Living. The agency is expected to meet curb ramp installations targets on a specific timeline as a condition of the settlement agreement. In efforts to meet the curb ramp installations on the timeline, projected revenues allocated to the Fix-It were advanced from the 2024-2027 STIP to the 2021-2024 STIP.

In light of the need to advance funds for curb ramps and also pull future revenues to complete House Bill 2017 earmarked projects, the OTC directed ODOT staff that if federal funding comes in above the anticipated level that the additional funding go towards the following:

- Repay back the \$28 million reduction in the Other Functions funding category. This would reduce federal funding used to cover ODOT's indirect costs to help close the agency's operational budget gap.
- Repay back the Fix-It funding category to address the advanced funds for the ADA curb ramps.

With the passage of Bipartisan Infrastructure Law, the State of Oregon received an addition \$1.2 billion in funding statewide. While some of those funds were statutorily pass-through dollars and some of the funds were restricted to certain uses, approximately \$400 million were flexible new funds to allocate. Using the same framework of the 2024-2027 STIP funding categories, the OTC deliberated how to allocate the funds across the Fix-It, Public and Active Transportation, Safety, Enhance Highway, Local Programs and Other Functions. ODOT staff conducted a similar process of developing allocation scenarios with the new funding from BIL and assessed how the scenarios would perform against the goals set by the Commission's strategic action plan, investment strategy, and the Governor's executive order pertaining to mitigating climate impacts. After accounting for the direction to repay back funds for certain programs which took reductions in the allocation decision made in December 2020, the OTC approved an allocation which added funding to the ODOT funding categories and created several new funding programs, some of which were discretionary and some of which are mandated through federal requirements outlined by the BIL. Table 4-2 outlines the allocation of the additional funding provided by the BIL.

**Table 4-2: Allocation of \$1.2 Billion of Additional Revenues Provided by the Bipartisan Infrastructure Law**

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<sup>5</sup> A full list of all programs and the funding allocated to them is available online at: <https://www.oregon.gov/odot/STIP/Pages/2024-2027-STIP.aspx>

Program	Amount in Millions
<b><i>Flexible Funds</i></b>	
Enhance Highway	\$50
Fix-It	\$75
Great Streets	\$50
Safe Routes to School	\$30
Innovative Mobility Pilot	\$5
Local Climate Planning	\$15
Maintenance & Operations	\$40
ADA Accessibility	\$100
Match for Federal Competitive Grants	\$40
Business & Workforce Development	\$7
<b><i>Mandated/Dedicated Programs</i></b>	
National Electric Vehicle Infrastructure	\$52
Carbon Reduction Program	\$85
State Bridge	\$192
Local Bridge	\$111
PROTECT	\$100
All Roads Transportation Safety	\$67
Community Paths/Transportation Alternatives	\$39
Congestion Mitigation & Air Quality Improvement (CMAQ)	\$11
Surface Transportation Block Grant (city/county/small MPO)	\$36
Surface Transportation Block Grant (large MPO)	\$38
MPO Planning	\$7
Public Transportation	\$222

With the increase in new revenues, the OTC created two new discretionary programs, one of which was based on feedback the Portland metropolitan region submitted to the OTC during the initial 2024-2027 STIP revenue allocation to funding programs. The new Great Streets funding program is a single funding source to address the myriad of needs on the state-owned district highways. The state-owned district highways often are not prioritized based on the criteria of the different ODOT funding programs such as pavement preservation or active transportation despite having significant deficiencies and gaps. The siloed nature of the funding programs often creates challenges to piece together a comprehensive project which is often most needed for the district highways. The other new discretionary program – the Innovative Mobility Program – is a pilot program which seeks to test mobility options best that best serve community mobility needs. The program aims to support marginalized communities implement mobility solutions to best serve their community. The OTC elected to provide additional state revenue to the program in efforts to ease the burden of federal funding administration to community-based and non-profit organizations.

Each of ODOT’s funding programs undergoes an allocation process that is informed by OTC policy direction, program direction, and any eligibility or restrictions pertaining to the funds being allocated. The allocation process for each of the funding programs dictates what investments get programmed in the 2024-2027 MTIP. Nonetheless, certain ODOT funding categories tend to follow a certain pattern in how it allocates funding each STIP cycle.



Some funding allocation programs are administered at the state level and targeted to ODOT owned facilities. Most of these allocation programs are considered part of the broader Fix-It category and some examples include the state bridge program and the state culvert program. Each of these programs has an internally ODOT staff driven project nomination and selection process that utilizes asset management data, project scope costs relative to the program's available revenues and other considerations relative to the program purpose. Some Fix-It funding programs, such as the state pavement preservation program, suballocates funding to the ODOT regions and the regional administrator works with staff and the asset management data to select projects.

For several funding allocation programs, ODOT leadership or the OTC has given direction to restrict to ODOT facilities. With this direction, in lieu of a solicitation process, ODOT Region 1 staff provides a background overview of the funding program at various regional tables, but mainly at the Area Commission on Transportation (ACT). The overview discusses the purpose of the funding program and invite partners to share project candidates and/or fund leveraging opportunities. ODOT staff takes the information shared by local partners and conducts its own nomination process and shares with the ACT and local transportation agencies a draft project list of the ODOT Region 1 recommendations for funding. The project list typically represents 150 percent more project costs than forecasted available funds as a means to foster a trade-off discussion. Following the release of the project list, ODOT staff conducts project scoping to get a better handle on the project costs. The project cost information is then balanced to forecasted revenues. This project cost information as well as other factors assist in the final selection of projects.

For funding programs not restricted to ODOT facilities, a more traditional selection process takes place. For example, in the All Roads Transportation Safety funding allocation program, local agencies, along with ODOT, were eligible to apply for funding for projects that address safety needs regardless of the ownership of the roadway facility. Based on a technical evaluation of the candidate projects, ODOT Region 1 staff proposed a 150 percent priority projects list within Region 1 for the ARTS program. Previously, Metro staff participated on the evaluation committee of the Region 1 ARTS selection program as a means of coordinating Metro safety policy priorities into this allocation process.

Finally, there are some funding allocation programs administered at the statewide level that are open to all transportation agencies and are competitive application based. The prioritization process and criteria are unique to each statewide funding program. The Safe Routes to School project allocation program is an example of this type of program. Often, staff from an Oregon MPO is asked to participate in the evaluation committees of these funding programs as a means of obtaining MPO input. MPOs are also typically eligible to apply for these funds if appropriate.

## **Public involvement**

Similar in development of previous STIP cycles, the ODOT staff at headquarters primarily ran the public involvement process for the first phase of the 2024-2027 STIP development. The first phase primarily included the discussion of the revenue forecast for federal fiscal years 2024 through 2027 and the assignment of those projected revenues to the different ODOT funding categories and programs. Public involvement activities primarily took place in November 2020, when ODOT held an official public comment period asking the public and stakeholders for comment on potential revenue allocation scenarios and the potential performance results for the different investment scenarios in making progress towards the OTC's strategic action plan, investment strategy, and climate goals. Significant public input was received by the OTC and ultimately the public input influenced the outcome to increase investment in public and active transportation in the 2024-2027 STIP at levels not previously seen in prior STIP cycles.

Due to the passage of the Bipartisan Infrastructure Law, ODOT staff at headquarters once again led the public involvement activities as the OTC discussed how to invest \$400 million in additional discretionary revenue to ODOT's various funding programs. A second public comment period was held in February 2022 with significant attention because of the high profile of the increased funding due to BIL. In addition to a formal public comment, discussions were also held at the Area Commissions on Transportation, modal advisory committees and metropolitan planning organization policy boards, as well as two webinars during this second public comment. The public comment led to the investment scenario where all the ODOT funding categories saw an increase and several new funding programs, such as Great Streets – a discretionary program – and the National Electric Vehicle Infrastructure – a statutory program – were created.

ODOT Region 1 primarily conducted outreach on the development of the 2024-2027 STIP through the Area Commission on Transportation (ACT). Metro staff continued to invite ODOT staff to share information and gather input from the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council, particularly during the discussion to assign forecasted revenues to funding programs. In addition, the Metro Council and JPACT submitted a joint comment letter to the OTC requesting the 2024-2027 STIP create a new funding program to address the myriad of needs on the state-owned district highways that the current structure of the ODOT funding programs were not well equipped to address. While the initial allocation decision in December 2020 did not incorporate the feedback from the Portland region, the second allocation decision did create the Great Streets funding program, in response.

Following the allocation decision and for the purposes of coordination with the 2024-2027 MTIP, the Portland metropolitan region continued to engage in the ODOT 2024-2027 STIP development process. Metro staff requested program managers provide regular updates at the regional committees on the solicitation process and allocation of the ODOT funding programs of interest to the region, including Great Streets, the Bicycle-Pedestrian Strategic, All Roads Transportation Safety funding programs.

With the draft 2024-2027 STIP prepared, the OTC held for public comment the draft 2024-2027 STIP in a formal 45-day public comment period from early March 2023 to the end of April 2023. ODOT created an online public comment platform providing the chance to make final comments on the program for all projects across the state.<sup>6</sup> Concurrently, ODOT Region 1 held two in-person public comment opportunities to discuss the projects and programs in the draft STIP in Region 1. ODOT Region 1 staff presented the projects and programs to be included in the 2024-2027 MTIP at regional committees.

## **Final allocation outcome**

ODOT Region 1 has allocated nearly \$370 million, in the Portland metropolitan area in the 2024-2027 MTIP. ODOT's administered funding comprises nearly one-third of the \$1.3 million to comprise the 2024-2027 MTIP. The largest investment by ODOT are in preservation and maintenance with bridge replacements projects making up a significant portion of the investments by ODOT in the near-term investment plan. Additionally, a large programmatic investment into curb ramp upgrades in response to a settlement agreement are also included in the 2024-2027 MTIP as investments by ODOT.

Further information about ODOT's 2024-2027 STIP can be found in Appendix II.

## **SMART annual budget process**

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<sup>6</sup> More details can be found at: <https://www.oregon.gov/odot/STIP/Pages/2024-2027-STIP.aspx>

## Financial analysis

### Financial forecast

To estimate the amount of available revenue for fiscal years 2024-2027, SMART used a methodology that is consistent with Metro's projections, based on historical trends and updated with actual appropriations and limitations. SMART collaborates with other regional transit agencies to estimate shares of the Urbanized Area Formula Funds from the Federal Transit Administration.

**Local programs:** SMART's predominant source of ongoing funding is the local payroll tax levied on businesses performing work in Wilsonville assessed on gross payroll and/or self-employment earnings. The payroll tax on local businesses covers employment within city limits and in 2008 the tax rate was raised to its current level of .5 percent (.005). Transit tax funds are used to pay for SMART operations and to leverage funding from federal and state grants. Payroll tax amounts collected by the city typically increase year to year, as companies increase their payroll through wage adjustments or by adding to their payroll and as the economy grows with new businesses relocating to the city.

A much smaller component of local funding includes charges for services, such as fare box and transit pass sale revenue. Currently, SMART charges fares for all routes that travel outside of the city of Wilsonville. SMART also receives a small percentage of other income received by way of investment and donations. These monies are outside of the traditional structure of revenues and may be reinvested or reallocated.

**Federal programs:** Nearly all federal funds received directly by SMART are subject to the policies and regulations of the Federal Transit Administration (FTA), with only minimal potential for Federal Highway Administration (FHWA) funding. There are seven federal funding programs that directly and indirectly come to SMART that support regular operations and capital purchases. Many of these programs saw an increase in funding in the 2024-2027 STIP cycle due to the enactment of the Bipartisan Infrastructure Law (BIL) which increased the federal funding available to public transit agencies.

FTA Section 5307 Urbanized Formula Funds are distributed to urbanized areas with population greater than 50,000. The program divides urbanized areas into two primary categories that are determined by the size of the metropolitan area where the transit service area is located. Given that Wilsonville is within the Portland Metro region, SMART is within the category of "large urbanized areas with a population above 200,000." For large urbanized areas, these funds may only be used for capital expenditures as defined by the FTA. This funding source has been relied upon by SMART and other public transit agencies in large urban areas.

FTA Section 5339 Bus and Bus Facility program funds are distributed through a competitive process by the FTA. These funds can be used only for the purchase of rolling stock or the construction of transit facilities that support transit bus operations. These funds are allocated through a highly competitive process. Future awards are dependent on the specific process outlined by the FTA and the strength of other project proposals competing against SMART's requests for funding. SMART has had a fairly successful track record in securing these and other FTA grant funds for replacement buses and has been able to modernize the fleet in recent years.

FTA Section 5310 Elderly and Disabled program funds are funds to be used to make purchases of capital equipment or construction of small facilities. The expenditures must be used to support transportation services for seniors and persons with disabilities. The funds are provided through a competitive grant program on a biennial cycle. As FTA funds they follow all federal requirements associated with the

program. Projects funded with this program are intermittent and on an as-needed basis. A relatively small amount of additional 5310 funds comes to SMART as a result of Wilsonville’s status as a “direct recipient” of FTA monies. Those funds actually come to the region and SMART’s share is determined through a negotiated process involving SMART, TriMet and C-Tran (Clark County Transit, Washington).

The Surface Transportation Block Grant (STBG) source of revenue is Federal Highway Administration (FHWA) funds that can be transferred into other U.S. Department of Transportation administrations (e.g. Federal Transit Administration) and funding programs. Once the funds have been transferred, they take on the same program requirements as the program into which they were transferred. ODOT transfers these funds, either at their discretion or in accordance with a legislative directive. SMART has also been awarded these funds by the Metro Regional Flexible Fund process to support its transportation options (TO) program.

**State revenue sources:** An important source of funding available through the State of Oregon is the State Transit Improvement Fund (STIF). The STIF is a state revenues sources are relevant to transit agencies budgets and eligible to fund local operations and activities where federal funds cannot be spent.

The STIF program was created by legislative action in 2017. Derived from an employee tax, these funds are primarily directed to transit agencies in the state to support operations. To be eligible to receive these funds, transit agencies must complete a plan that is approved by the OTC.

Since 1983, the Special Transportation Fund (STF) program was another state revenue source available for transit agencies. STF is funded by a combination of cigarette tax, the non-highway use portion of gas tax, and fees for personal identification cards issued by the Driver and Motor Vehicle Division (DMV) of ODOT. These funds may be used to support operations, capital purchases, and planning for services that provide transportation to seniors and persons with disabilities. Prior to July 2020, STF program funds were distributed through a combination of formulas and competitive grants, where the formula takes approximately 75 percent of the annual fund and distributes it on a population basis to a designated STF agency, which for the Portland metropolitan region is TriMet. SMART engages in the competitive process to determine the allocation of the funds to projects within the region.

However, due to Senate Bill 1601 passed in July 2020, STF was consolidated into the Statewide Transportation Improvement Fund (STIF). The purpose of the merger was to increase efficiency and funding reliability for public transportation providers throughout Oregon. A process was undertaken throughout 2021 and 2022 to define the terms of the merger of two programs while maintaining the intent of the STF. The transition of the consolidated STF and STIF is to take place starting July 2023.

## Public transit costs

Costs for SMART are determined through the city’s five year financial forecast (FY 2027-2028). These expenses are anticipated to increase by at least an annual inflation rate of 2 percent per year for the foreseeable future, while maintaining roughly comparable levels of service. The most volatile components of SMART's expenses are public employees retirement system (PERS) related costs, salaries, health insurance costs, and fuel. Salaries and wages will grow in general at roughly a 2.5 percent rate while benefits are projected to increase approximately 4 percent to 6 percent.

## Policy direction and criteria

SMART’s Transit Master Plan provides a tool for local implementation of transit and transportation options related provisions in the Oregon Transportation Plan (OTP), the Oregon Transportation Planning

Rule (TPR), the Regional Transportation Plan (RTP), Americans with Disabilities Act (ADA), and the Tri-County Coordinated Transportation Plan for Seniors and Persons with Disabilities (CTP). Goals, objectives, and implementation measures of SMART's transit plan must support the City's overall goals as well as the county, regional, state, and federal goals. Adopted in 2017, the TMP also builds on previous local plans, studies and reports and provides direction for the agency through 2022. In May 2022, SMART kicked off the process to update the TMP looking forward to the transit service needs and solutions to 2028. The updated TMP is expected to be adopted in summer 2023.

In recognition of the TMP update, SMART referred to the goals and implementation measures listed in the 2017 adopted Transit Master Plan as well as information gathered to date to inform the 2023 TMP update. The original 2017 TMP goals were created by a citizen task force from which SMART staff developed implementation measures and projects to coincide.

SMART allocates its formula funding through the annual City of Wilsonville budget and Capital Improvements Program (CIP) processes. Nearly all federal funds – formula and discretionary – are received directly by SMART and are subject to the policies and regulations of the Federal Transit Administration (FTA). The use of FTA funds reflects the shared goals of the region and is consistent with FTA regulations. For example, providing safe, reliable and efficient public transportation by replacing diesel buses with compressed natural gas (CNG) and electric buses aligns with the Regional Transportation Plan, the Climate Smart Strategy, and the FTA's goal to support the transition of the nation's fleet to the lowest polluting and most energy efficient transit vehicles.

## **Public involvement**

SMART carries out a robust local public process that includes print advertising, ad hoc committees, and public meetings. For example, the programming of projects (POP) is advertised in the local Wilsonville Spokesman; an ad hoc committee informs SMART's Dial-a-Ride services; and public comment opportunity is made available at public workshops (as was the case with the TMP) and city council meetings. As part of SMART's development of its annual budget and POP, these public involvement strategies were used.

Any needed adjustments to initial TIP programming as developed during the annual SMART budget and Programming of Projects process are submitted to Metro. Significant adjustments require a TIP amendment which includes a 30-day public comment period and actions by the MPO committee structure in public meetings subject to Oregon public meeting law.

## **Final allocation outcome**

SMART has just under \$10 million programmed in the 2024-2027 MTIP across several different program areas, operations, and transit service. The bulk of SMART's programmed funds are for the maintenance and asset management of the system. The remainder is for the delivery of transportation options, particularly for the elderly and persons with disabilities. With local funds, SMART provides other transportation options services and continues to transition its equipment and vehicles to alternative fuels.

Further information about SMART annual budget process can be found in Appendix II.

## **TriMet annual budget process**

## Financial analysis

### Financial forecast

As part of TriMet's annual budget process, the agency develops a rolling ten year revenue and expenditure forecast. The development of the revenue forecast for the relevant MTIP years of 2024 through 2027 considered several different factors including, but not limited to the current effective transportation reauthorization, local revenue sources, and various grants. As outlined in TriMet's annual budget, TriMet has six categories of revenues; passenger fares, payroll taxes, State transit investment funds, other funding, operating grants (federal and non-federal), and capital improvement grants (federal).

In addition, TriMet worked with Metro and utilized the rolling ten-year revenue forecast as an input to the revenue estimation process for development of long-term future plans, projects, and programs in support of the development of the 2018 and 2023 Regional Transportation Plan (RTP). This ensures consistency in data for the RTP long-range plan, the MTIP and TriMet's annual budget process and Programming of Projects.

TriMet's strategic financial plan outlines the financial and operational policies that guide TriMet forward in navigating near-term challenges and achieving a sustainable future. TriMet considers the budget balanced under one of three scenarios: 1) total expenditures are equal to total revenues, 2) total expenditures are less than total revenues resulting in increases to fund balance, or 3) expenditures exceed revenues, but unappropriated fund balances remain from previous year's spending. For fiscal year 2024, TriMet's budget is balanced under scenario three.<sup>7</sup> The TriMet budget document demonstrates the following financial strategic policies to guide financial decision making including:

- Fiscal policy – One-time-only revenues support one-time-only expenditures including capital additions, startup costs, one-time maintenance efforts and other costs that are non-recurring. Continuing revenues pay for continuing expenditures and one-time expenditures.
- Unrestricted fund balance – Begin each fiscal year with an unrestricted fund balance equal to 2.0 to 2.5 times average monthly operating expenditures.
- Debt management – Debt service on senior lien payroll tax revenue bonds must be no more than 7.5 percent of continuing revenues.
- Fare policy – Sustainable system that encourages and supports ridership and ensures broad access to transit services. A recent fare increase has .....
- Capital asset management – Maintaining assets in a state of good repair throughout their useful life to help ensure a safe, reliable and convenient service for customers.
- Pension funding plan – Provide a process to fully fund the pension benefit plans and OPEB benefits.

TriMet relies on a significant amount of revenues from the Federal Transit Administration (FTA), an agency within the USDOT that supports local public transit systems including buses, light and commuter rails. FTA also supports safety measures and helps develop next generation technology research. FTA is one of USDOT's modal based transportation agencies, headquartered in Washington, D.C. and assisted by 10 regional offices.

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<sup>7</sup> More information on the TriMet budgeting and forecasting process can be found at: <https://trimet.org/budget/>

The Bipartisan Infrastructure Law (BIL), the current transportation authorization law, supports transit funding through federal fiscal year 2026. The Act's five years of predictable formula funding enables TriMet to better manage long-term assets and State of Good Repair. Federal transit revenues in the 2024-2027 MTIP cycle extending beyond 2026 is assumed to be supported by a new authorization bill that forecasts a 3% annual growth rate of revenues, consistent with historical patterns of revenue authority.

The current Act is largely supported by dollars transferred from the government's Highway Trust Fund as well as the General Fund. BIL also increases funding for existing discretionary grant programs and creates new competitive grant programs for buses and bus facilities, innovative transportation coordination, workforce training and public transportation research activities. TriMet has applied for and received some of these types of funding.

Traditional Formula Funds supported under BIL that TriMet has historically benefited from and are reflected in this MTIP, include Sections: 5307 (Urbanized Area Formula Grants), 5337 (State of Good Repair Grants), 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities Grants) and 5339 (Grants for Buses and Bus Facilities).

Formula funding is made available annually to Urbanized Areas (UZA). TriMet, a designated recipient, receives an assigned amount directly, then sub-apportions the funding to two different public bodies (C-Tran in Vancouver and SMART in Wilsonville) based on an agreed upon method. The funding split was most recently agreed to in January of 2023 for FFY 2023 revenues and is forecasted to remain consistent through the MTIP period. Funding sources for each of TriMet's eligible Formula Grant Programs are described as follows:

1. Section 5307 (Urbanized Area Formula Grants):

Funds are to be used for transit capital and operating assistance in urbanized areas (population of 50,000 or more that is designated as such by the U.S. Department of Commerce, Bureau of the Census) and for transportation-related planning. For areas with populations of 200,000 and more, formula funding is based on a combination of bus revenue vehicle miles, bus passenger miles, fixed guideway revenue vehicle miles and fixed guideway route miles as well as population and population density. FTA also apportions Section 5340 (Growing States) funds to qualifying UZAs. These amounts are added to the Urbanized Area's Section 5307 apportionment.

2. Section 5337 (State of Good Repair Grants (SGR)):

Funds provide capital assistance for maintenance, replacement and rehabilitation projects of high intensity fixed guideway and bus systems to help transit agencies maintain assets in a state of good repair. Additionally, SGR grants can be used for developing and implementing Transit Asset Management plans. Funds allocated to UZAs by statutory formula for high intensity fixed guideway systems are based on revenue and route miles reported to the National Transit Database (NTD) and what the UZA would have received in the fiscal year 2011 fixed guideway modernization formula. Funds allocated to UZAs by statutory formula for high intensity motorbuses are based on revenue and route miles reported to the NTD. TriMet sub-apportions the High Intensity Motorbus State of Good Repair formula funds with C-Tran and SMART as they provide services in the UZA; however, only TriMet provides fixed guideway services in the area; therefore, no sub-apportionment of funds is needed.

3. Section 5339 (Grants for Bus and Bus Facilities):

Funds provide, through a statutory formula, for replacement, rehabilitation and purchase of buses and related equipment and to construct bus-related facilities. In addition to the formula allocation, this program now includes two discretionary components: The Bus and Bus Facilities and Low or No Emissions grant programs.

4. Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities):

This program provides formula funding for the purpose of assisting private nonprofit groups in meeting the transportation needs of older adults and people with disabilities when the transportation service provided is unavailable, insufficient or inappropriate to meeting those needs. This program also aims to improve mobility for seniors and individuals with disabilities by removing barriers to transportation service and expanding transportation mobility options. Funds are apportioned based on each state's share of the population for these two groups.

5. Regional Flexible Fund Allocation (Urban STBG and CMAQ funds):

TriMet continues to receive pass-through funds from Metro, as the MPO, via the RFFA process. Flexible funds from either the Surface Transportation Block Grant (STBG) or Congestion Mitigation and Air Quality Program (CMAQ) revenue source are transferred from the Federal Highway Administration to FTA go to one of three programs: Section 5307, Section 5311 or Section 5310. Once they are transferred to FTA for a transit project, funds are administered as FTA funds and take on all the requirements of the FTA program.

TriMet has issued Capital Grant Receipt Revenue Bonds to finance a portion of capital costs and improvements of the transit system, including: Washington County Commuter Rail and Interstate 205/Portland Mall Light Rail Project, Portland Streetcar Extension, Portland Milwaukie Light Rail Project and purchase of new buses. The Grant Receipt Revenue Bonds are payable from and secured by a pledge of STBG and CMAQ funds, or replacement grant programs and amounts credited to a debt service account.

TriMet has also been awarded STBG funding in the past for Rail/Bus Preventive Maintenance, RTO Program and other construction costs. TriMet's Regional Transportation Options (RTO) Program promotes transportation services via outreach and marketing and educates employers about the range of commute options available to their employees. The program also facilitates the coordination of services of employer-oriented transportation management associations, other public transit agencies, regional government and employer based transportation coordinators to promote access to and use of transportation services.

6. Section 5309 Capital Investment Grants (CIG) Program:

FTA also provides discretionary funding in competitive processes. FTA's primary grant program for funding major transit capital investments, including heavy rail, commuter rail, light rail, streetcars, and bus rapid transit, is the Section 5309 Capital Investment Grants (CIG) Program. Unlike most other discretionary grant programs, instead of an annual call for applications and selection of awardees by the FTA, the law requires that projects seeking CIG funding complete a series of steps over several years to be eligible. There are four categories of eligible projects under the CIG program: New Starts, Small Starts, Core Capacity, and Programs of Interrelated Projects. New Starts projects are new fixed guideway projects or extensions to existing fixed guideway systems with a total estimated capital cost of \$300 million or more, or that are seeking \$100 million or more in Section 5309 CIG program funds.



For New Starts projects, the applicant agencies must complete Project Development and Engineering in advance of receipt of a construction grant agreement.

To prepare to apply for CIG funding, Metro and TriMet jointly develop major transit projects in the early stages of project development. Both agencies work together through the project concept, alternatives analysis and identification of final alternative/alignment for the project. Metro and TriMet jointly work together on the environmental scoping, National Environmental Protection Act (NEPA) classification, and the NEPA documents. Metro also plays a role in executing the outreach and engagement strategy. TriMet takes over responsibility of a transit project after project planning has been completed by Metro and the Locally Preferred Alternative has been selected. TriMet will apply to the FTA for entry into project development phase and for a project rating. The FTA reviews the financial capacity, cost estimates, scope, schedule, budget and capability and capacity of TriMet to construct and operate the project. As part of FTA's review, FTA hires a project management and financial management oversight consultant to conduct these detailed reviews and completed before entry into the engineering phase and the issuance of a Full Funding Grant Agreement.

TriMet works with local, regional and state partners to secure local matching funds and any CMAQ/STGB funds that may be used for projects seeking CIG funds. These funding discussions occur during the development of the Draft Environmental Impact Statement and continue during the Final Environmental Impact Statement through to the issuance of the Full Funding Grant Agreement. Non-Capital Investment Grant funding commitments are documented through intergovernmental agreement (IGA). These IGAs document the amount of funding and when funds will be provided to TriMet. TriMet is then responsible for managing the construction, schedule and cash flow for these projects.

TriMet, in partnership with Metro and the FTA, amends CIG projects into the MTIP at the appropriate time and as appropriate project development thresholds are reached. Recent examples of TriMet CIG projects include the Division Transit Project and the Better Red Project.

Going forward, TriMet and partners will also work to complete project development on two better bus projects: the Tualatin Valley Highway Bus Rapid Transit and the 82<sup>nd</sup> Avenue Bus Rapid Transit Project. In addition, TriMet continues to work on a financial plan for the Southwest Corridor Light Rail Project.

## Public transit costs

TriMet's forecast cost projections assume the current cost structures remain in place and cost trends continue. Projections (also known as baseline projections) are designed to serve as a benchmark that can be used to evaluate and adjust revenues and expenditures. This allows TriMet to balance accounts, add service, pay down debt service, and invest in capital projects or fund liabilities. After the projections are updated, TriMet creates a proposed forecast that includes cost savings and revenues needed to achieve financial stability, meet requirements for TriMet's State-of-Good-Repair needs and service commitments to the region, and aligns with the strategic financial plan.

TriMet views its capital projects as either additions to the capital plan or as rehabilitation and replacement of the existing capital. TriMet plans and budgets replacement projects as follows:

- Each department maintains an inventory and condition assessment of capital items. The purpose of the inventory is to estimate the life expectancy, condition and replacement costs of TriMet's existing capital assets, whether or not they will be programmed for replacement during the next five years. With this information, TriMet plans for future expenditures, sets replacement schedules and establishes infrastructure standards.

- This inventory is updated and refined each year prior to the budget process, with another year added for planning purposes.
- During the annual budget process, replacement projects must be justified based on the actual condition or repair history of the facility or equipment.

## **Policy direction and criteria**

Annually, TriMet conducts the allocation of FTA formula and discretionary funds, State Transportation Investment Fund, and TriMet local revenues through the annual budget process. Beginning in the autumn each year and adopted in the spring the following year, the annual budget process is guided by federal and state laws, as well as regional and local plans. In particular local government budgeting law plays a significant role in the allocation of federal and state funding in TriMet's budgeting process.<sup>8</sup> The law has two major objectives: 1) Provide standard procedures for preparing, presenting, and administering local budgets; and 2) Ensure citizen involvement in the preparation of the budget. Development of the TriMet budget is an effort shared by riders as well as the broader community, with consideration of safety, equity, and other long-term concerns and issues. The Tax Supervising and Conservation Commission (TSCC), a five-member citizen board appointed by the Governor, reviews the budgets of all governmental jurisdictions in Multnomah County. The TSCC, together with the state department of revenue, is responsible for ensuring the TriMet budget complies with local budget law.

Concurrent with the development of the annual budget, TriMet develops the proposed program of projects (POP). These projects outline how federal funding is proposed to be allocated across a range of projects and programs. These projects outline funding sources including: Section 5307 Urbanized Area Formula; Section 5337 State of Good Repair; Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities; Section 5339 (a) Bus & Bus Facilities; Section 5312 Innovations in Transit Public Safety; Section 20005(b) Pilot Program for Transit-Oriented Development Planning; Surface Transportation Block Grants; and Congestion Mitigation & Air Quality. These funds include Bus & Rail Preventive Maintenance: Labor and materials/services used for on-going maintenance of Bus and Rail fleets in TriMet's service district of Clackamas, Multnomah and Washington Counties. In addition, the annual program of projects also highlights any project awarded FTA Capital Investment Grants (CIG) from the previous year, after the budget has been adopted.

Lastly, for high capacity transit investments, projects are identified through regional planning efforts that include Metro's High Capacity Transit Plan, the Regional Growth Concept and the Regional Transportation Plan.<sup>9</sup> TriMet also develops a Capital Improvement Plan and service planning efforts, such as the recent Forward Together reimagined service planning effort in light of the pandemic, that guide transit investments. These plans are guided by technical analysis, are subject to significant policy overview by MPO committees and local governments and go through extensive public involvement efforts.

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<sup>8</sup> Oregon Revised Statutes Chapter 294, Local Budget Law.

<sup>9</sup> The 2023 Regional Transportation Plan update includes the update of the 2009 High Capacity Transit Plan modal plan.

## Public involvement – annual budget process

To give the public ample opportunity to participate in the budget process, local budget law requires that a budget officer be appointed and a budget committee formed. The budget officer prepares the proposed budget under direction of the TriMet general manager. The board of directors also serves as the budget committee, then reviews and, if needed, revises the proposed budget before it is formally adopted. For TriMet, the budget officer is the TriMet chief financial officer, Executive Director of Finance & Administrative Services and Budget & Grants Administration Department, which is responsible for preparing and publishing the budget document. Notices are published, budgets are made available for public review, and opportunities for public comment are provided. These actions enable public participation in the budget decision-making process and give public exposure to budget programs and fiscal policies before adoption. TriMet divisions prepare budget modification requests in accordance with direction given by the board of directors and general manager. These are submitted to the general manager, who then analyzes and approves the requests. The proposed budget is the culmination of an extensive process of budget development, analysis, and revision.

TriMet engages in a proactive public outreach effort throughout the year by holding public meetings to gather feedback on service changes and services for seniors and people on a low income. The budget development process includes management, labor, riders, and internal and external experts. In advance of the proposed annual budget, TriMet held two general community meetings (one in the fall and one in spring), four culturally specific outreach meetings, and three liaison meetings in non-English speaking communities. Community members may directly contact TriMet with input for the budget during public outreach meetings described above or online. In addition, community members also have opportunity to personally testify on the TriMet budget at the budget hearing of the board of directors.

TriMet maintains a community budget web page.<sup>10</sup> The site contains TriMet’s proposed, approved and adopted budgets, along with TriMet’s audited financial statements, strategic financial plan, Pension/OPEB Valuations, and board approved policies.<sup>11</sup>

Each year, TriMet provides an opportunity to submit comments or request a public hearing on the proposed program of projects and issues public notice. The public hearing is an opportunity to submit comments in person rather than via the email link [federalfunding@trimet.org](mailto:federalfunding@trimet.org). If requested, the public hearing will be held at TriMet’s offices. If no request for a public hearing is received, the proposed program of projects will become the final program of projects.<sup>12</sup>

Any needed adjustments to initial MTIP programming as developed during the annual TriMet budget and Programming of Projects process are submitted to Metro. Significant adjustments require a MTIP amendment which includes a 30-day public comment period and actions by the MPO committee structure in public meetings subject to Oregon public meeting law.

## Final allocation outcome

TriMet has over \$500 million programmed in the 2024-2027 MTIP primarily for maintenance projects, operations for transit service for the elderly and persons with disabilities, and alternative fuel vehicles. Additionally, TriMet’s programming includes several fund exchanges of Metro’s federal funds.

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<sup>10</sup> [www.trimet.org/about/accountability.htm#financial](http://www.trimet.org/about/accountability.htm#financial).

<sup>11</sup> More information about the TriMet budgeting process can be found at: <https://trimet.org/budget/>

<sup>12</sup> More information can be found at: <https://trimet.org/budget/pdf/2024-approved-budget.pdf>

Further information about TriMet's budget process and program of projects can be found in Appendix II.

## **TriMet Special Transportation Fund allocation (STF)**

### **Policy, public involvement, allocation, and performance reporting**

The Special Transportation Fund Advisory Committee (STFAC) is appointed by the TriMet Board of Directors to advise TriMet by making informed recommendations about the distribution of grants funded by the State of Oregon's Special Transportation Fund (STF) and the Federal Transit Administration's Enhanced Mobility of Seniors and Individuals with Disabilities - Section 5310. TriMet serves as the main transit agency to receive, distribute, administer, and monitor both STF and Section 5310 funding. The STFAC includes a broad representation of users of transportation services and providers including all interested members of the Committee on Accessible Transportation (CAT), as well as representatives from Clackamas, Multnomah and Washington Counties aging and disabilities service agencies, out-of-district transit providers, seniors and persons with disabilities from the three Counties, seniors and persons with disabilities representing out-of-district consumers, Ride Connection, and TriMet.

The STF program was a state revenue source available for transit agencies. Created by the legislature in 1983, STF is funded by a combination of cigarette tax, the non-highway use portion of gas tax, and fees for personal identification cards issued by the Driver and Motor Vehicle Division (DMV) of ODOT. STF funds may be used to support operations, capital purchases, and planning for services that provide transportation to seniors and persons with disabilities. The Federal Transit Administration's Enhanced Mobility of Seniors and Individuals with Disabilities (Section 5310) is a federal funding program aimed at transit agencies for the purpose of improving mobility for older adults and people with disabilities. Section 5310 funding can be used as funding assistance for operating and capital to private nonprofit groups in meeting the transportation needs of older adults and people with disabilities when the transportation service provided is unavailable or insufficient to meeting those needs. Funds are apportioned based on each state's share of the population of older adults and people with disabilities.

Prior to July 2020, STF program funds were distributed through a combination of formulas and competitive grants, where the formula takes approximately 75 percent of the annual fund and distributes it on a population basis to a designated STF agency, which for the Portland metropolitan region is TriMet. The three-county STF area receives approximately \$10–15 million in STF formula, supplemental, and discretionary funds each biennium. In combination with the Section 5310 funding which provides approximately \$1.4 million annually. STF funds have played an important role in the expansion of community-based services for seniors and persons with disabilities as well as in the preservation of fixed route and complementary paratransit services.

However, due to Senate Bill 1601 passed in July 2020, STF was consolidated into the Statewide Transportation Improvement Fund (STIF). The STIF are funds from the State of Oregon, who collect several taxes and fees, are passed through to public transit service providers to support transit service in the state. The STIF is primarily funded through a tax on employees. The purpose of the merger was to increase efficiency and funding reliability for public transportation providers throughout Oregon. A process was undertaken throughout 2021 and 2022 to define the terms of the merger of two programs while maintaining the intent of the STF. The transition of the consolidated STF and STIF is to take place starting July 2023.

Despite the consolidation of the STF program into the STIF program, the new rules established for the consolidated program continues to retain the role of the STFAC and the committee continues to allocate

funds through a solicitation process in which applications are scored on criteria derived from the Coordinated Transportation Plan for Seniors and People with Disabilities (CTP). The CTP must be updated and approved by the TriMet Board of Directors every four years. The most recently updated CTP was adopted in 2020 and continues to build upon the region's vision of a continuum of transportation services that takes into account people's abilities as they transition through various stages of age and disability. The newly consolidated program would support transportation activities which reinforce and support the continuum. Eligible applicants for STIF and Section 5310 funds are public transit providers, not for profit private transportation organizations, and local jurisdictions. All applications must focus on providing transportation for seniors and/or people with disabilities. All STFAC meetings follow Oregon's Public Meeting Law. The final recommendations for STIF funds are forwarded to the TriMet Board of Directors for approval. Once approved, TriMet enters an inter-governmental agreement with ODOT for the funds and passes them through to the awardees through sub-recipient contracts. Per its IGA with ODOT, TriMet ensures contract compliance by the individual sub-recipients.

By following indicators in Monthly Performance Reports, program managers and the STFAC can identify under or outperforming STIF and Section 5310-funded projects, watch for trends, and help ensure that tax dollars are being allocated most efficiently. All supporting materials are hosted on TriMet's public website, including STFAC membership, grant opportunities, allocation awards, and performance reports.



## CHAPTER 5: DEMONSTRATING FEDERAL REGULATORY COMPLIANCE: MTIP DEVELOPMENT REQUIREMENTS & OTHER MISCELLANEOUS FEDERAL REGULATIONS

The following sections describe the 2024-2027 MTIP compliance with federal regulations.

### Fiscal constraint

Fiscal constraint is maintained by balancing revenues available in a fiscal budget year with the project costs incurred in that year. For the 2024-2027 MTIP, four years of revenues are forecasted and four years project costs are estimated. Fiscal constraint is demonstrated by showing the total programming of projects costs by project phase do not exceeding forecasted revenues in any year in the MTIP. The tables below show for each of the agencies administering federal funding within the Portland metropolitan area – ODOT, transit agencies TriMet and SMART, and Metro – programmed project costs in fact do not exceed revenues available in each year of the MTIP.

Revenue streams and project cost estimates are then actively managed through the life of the MTIP and adjustments made to ensure fiscal constraint is maintained. The specific administrative rules and process utilized to actively manage the project cost element of fiscal constraint are described in Chapter 8.

### Fiscal constraint of the Metro Regional Flexible Fund Allocation

Regional Flexible Fund Project costs, by phase of each project (planning, project development, preliminary engineering, right-of-way acquisition, construction) are programmed (see tables in Chapter 6) for the year in which they are anticipated to obligate. This includes project phases carrying over from the

#### Chapter sections

- Fiscal constraint
- Regional Transportation Plan (RTP) consistency
- Congestion management process and MAP-21 performance measures
- Other federal regulations

previous 2021-2024 MTIP, and new projects funded with new revenue capacity expected in years 2025-2027.

Table 5-1 below demonstrates more revenue is forecasted as available to the RFFA program during the four-year period of the MTIP as has been scheduled for obligation and spending of funds on projects and programs. This demonstrates fiscal constraint of the regional flexible funds for the 2024-2027 MTIP.

Metro continues to utilize two management tools to help maintain financial constraint of the MTIP. First, Metro implemented a six-year programming framework of regional flexible funding to selected projects, rather than the traditional four-year programming framework. Per federal regulations, the fifth and sixth year of programming are informational only and not recognized as approved programming by USDOT. However, a six-year programming schedule allows for more realistic scheduling of more complex projects that need to progress through project development, engineering, right-of-way acquisition and construction phases. Often this process, especially when needing to document and obtain federal regulatory approval associated with federal aid projects, may take longer than the four years of programming offered by the traditional four-year MTIP programming framework. The six-year programming option provides the opportunity to match programming with a realistic project schedule, improving both transparency and the need to later amend the MTIP programming to match actual project delivery schedules.

The other management tool used in this MTIP is the annual obligation targets to improve the on-time delivery of federal aid projects in Oregon. Primarily applicable to Oregon's large MPOs, the annual obligation target process is based on programming agreed to between the MPOs and ODOT. The MPOs actively manage delivery of projects to meet a target percentage of programmed funds each year. Failure to meet targets will result in funding penalties, while meeting targets makes the MPO eligible for additional funding capacity based on a percentage of any federal redistribution funds that may come to Oregon. The establishment of targets increases the collaboration between ODOT and the large MPOs in cooperatively managing the financial constraint of metropolitan Surface Transportation Block Grant (STBG), STBG Transportation Alternatives (TA) set-aside, and Congestion Mitigation Air Quality (CMAQ) funding at a statewide level. For example, if one MPO wants to build up funding capacity for a large expenditure in a future year, ODOT or another MPO can utilize that funding capacity in the early years and then provide an equivalent amount of funding capacity in the future year when needed by the MPO. This allows Oregon to fully obligate all available funds in each year, keeping the state eligible for federal redistribution, while providing flexibility needed for the lumpy nature of funding capacity across project schedules. Since the implementation of the annual obligation target process in the 2021-2024 MTIP cycle, the Portland metropolitan region has successfully met its annual obligation target and maintained eligibility for redistribution funding.

In total, \$152.8 million of STBG, TAP, CMAQ and Redistribution revenues are forecasted as available in the 2025-2027 time period for the new projects selected in the recent RFFA process. These revenues are added to the revenues forecasted for federal fiscal year (FFY) 2024 as a part of the 2024-2027 MTIP that were already allocated to projects as a part of the 2022-2024 RFFA process. Funds available in FFY 2024 include the forecasted \$49.6 million of new FFY 2024 funds and also include unobligated funds from FFY 2023 that ODOT makes available to Metro area projects through an exchange of obligation authority. A total of \$257.3 million in RFFA revenues is currently forecast as available during the 2024-2027 period. This forecast will be updated with a more certain understanding of what funding will not obligate during the current FFY 2023 and will be carried forward to FFY 2024 in the adoption draft of the MTIP. Any final adjustments needed for unobligated projects and carryover of funding authority between the adoption draft and the end of federal fiscal year 2023 will be administered through amendment to the 2024-2027

MTIP after it becomes the active MTIP in FFY 2024. This is commonly referred to as the “transition amendment” and is typically the first amendment to the new MTIP.

**Table 5-1. Demonstration of fiscal constraint – Metro MPO allocated (STBG, CMAQ, TAP, CRP) regional flexible funds**

	2024	2025	2026	2027
Programmed Project Costs	\$49,844,820	\$67,853,163	\$66,524,146	\$84,607,996
Federal MPO Revenue Forecast*	\$97,202,114	\$54,150,929	\$54,944,603	\$51,037,255
Non-Federal Fund Sources	\$9,832,304	\$7,872,857	\$14,820,178	\$9,713,391
Difference	\$57,189,598	-\$5,829,377	\$3,240,635	-\$23,857,350
Balance of Revenue Capacity	\$57,189,598	\$51,360,221	\$54,600,856	\$30,743,506

\* 2024 Revenue forecast includes a carryover from 2023 of \$36.24 million.

Note: The region has committed \$34.91 million of 2025-2027 RFFA funding capacity to projects that are currently scheduled to obligate in 2028 and 2029.

## Fiscal constraint of the ODOT funding allocation programs

Programming of the ODOT funding allocation programs to projects located in the Portland metropolitan area are in the same amount of revenue as authorized by the Oregon Transportation Commission (OTC) for projects located in this region. Federal Highway Administration (FHWA) allows ODOT to fiscally constraining their funding revenues to their funding allocation programs at a statewide level. Therefore, if the OTC authorizes funding to ODOT administered funding allocation programs and on to projects funded through those programs, Metro considers that a commitment of funding to the project that meets the requirement of fiscal constraint.

Table 5-2 demonstrates that the funding commitments approved by the OTC are equal to the programming of funds to project costs.

**Table 5-2. Demonstration of fiscal constraint – ODOT funding allocation programs**

	2024	2025	2026	2027
Programmed Project Costs	\$228,944,531	\$54,953,763	\$21,942,290	\$62,436,900
Federal ODOT Revenue Forecast	\$195,082,188	\$44,012,563	\$20,007,446	\$56,618,404
State & Local Fund Sources	\$33,862,343	\$10,941,200	\$1,934,844	\$5,818,496
Difference	\$0	\$0	\$0	\$0

## Fiscal constraint of the SMART funding programs

SMART proposed programming of federal funds to programs in the exact amount they are forecasted to receive revenues. Table 5-3 below demonstrates that SMART’s programming is fiscally constrained.

**Table 5-3. Demonstration of fiscal constraint – SMART programs**

	2024	2025	2026	2027
Programmed Project Costs	\$847,500	\$7,515,456	\$712,500	\$733,750
SMART Federal Revenue Forecast	\$678,000	\$2,390,331	\$570,000	\$587,000
State & Local Fund Sources	\$169,500	\$5,125,125	\$142,500	\$146,750
Difference	\$0	\$0	\$0	\$0

## Fiscal constraint of the TriMet funding programs



TriMet proposed programming of federal funds to programs in the exact amount they are forecasted to receive revenues. Table 5-4 below demonstrates that TriMet’s programming is fiscally constrained.

**Table 5-4. Demonstration of fiscal constraint – TriMet programs**

	2024	2025	2026	2027
Programmed Project Costs*	\$126,424,092	\$141,865,381	\$139,660,045	\$143,683,745
TriMet Federal Revenue Forecast	\$100,960,275	\$113,846,658	\$112,076,859	\$115,290,121
State & Local Fund Sources	\$25,463,817	\$28,018,723	\$27,583,186	\$28,393,624
Difference	\$0	\$0	\$0	\$0

\* TriMet also has \$114.3 million of project costs programmed that are accounted for in the Metro MPO Fiscal Constraint Table 5-1.

## Fiscal constraint demonstration conclusion

Table 5.5 below displays all the funding programmed in the 2024-2027 MTIP. As all the funding allocation programs have adequate funding available in each fiscal year to meet the programming of funds to projects, fiscal constraint of the 2024-2027 MTIP is met.

**Table 5-5. Demonstration of fiscal constraint – all 2024-2027 MTIP programming**

	2024	2025	2026	2027
Programmed Project Costs	\$406,060,943	\$272,187,763	\$228,838,981	\$291,462,391
Federal Revenues Forecast	\$393,922,577	\$214,400,481	\$187,598,908	\$223,532,780
Non-Federal Fund Sources	\$69,327,964	\$51,957,905	\$44,480,708	\$44,072,261
Difference	\$57,189,598	-\$5,829,377	\$3,240,635	-\$23,857,350
Balance of Revenue Capacity	\$57,189,598	\$51,360,221	\$54,600,856	\$30,743,506

Note: The region has programmed \$34.91 million of 2025-2027 RFFA funding capacity to projects that are currently scheduled to obligate in 2028 and 2029.

## Regional Transportation Plan (RTP) consistency

The 2024-2027 MTIP employed a variety of techniques to ensure the investments within the 2024-2027 MTIP are consistent with the adopted 2018 RTP as well as what is known to date about the 2023 RTP.<sup>13</sup> The process of vetting and determining consistency takes place throughout the development of the 2024-2027 MTIP, starting at the initial program direction and policy discussions to guide the different funding allocation processes being led by ODOT, SMART, and TriMet and continuing through the preparation of final programming for the 2024-2027 MTIP. Through this continual vetting process for RTP consistency, the region ensures the investments put forward in the 2024-2027 MTIP make progress toward addressing one or more of the region’s transportation goals and are consistent with the region’s long-range financial forecast. The next sections describe the coordination approach used as part of the 2018 RTP consistency vetting process for the development of the 2024-2027 MTIP.

## Priorities for Investment

During the development of the 2024-2027 MTIP, Metro staff communicated with key MTIP partners – ODOT, SMART, and TriMet – the implementation on the four 2018 RTP priorities would serve as continued focus for the development of the investment package. MTIP partners – Metro, ODOT, SMART, and TriMet – applied the direction to implement the 2018 RTP priorities in different manners to balance

<sup>13</sup> The 2023 RTP is scheduled for adoption in November 2023.

against agency priorities as well as considering the funding restrictions of certain federal or state funds. In addition, the development of the 2024-2027 MTIP worked to incorporate emerging priorities arising in the 2023 RTP update process. The 2023 RTP update reaffirmed the necessity to continue making progress on the four 2018 RTP priorities, but considering the effects of the pandemic, economic development has been added as a priority for near-term implementation. Partners were encouraged to consider economic development in the prioritization of funding in addition to the existing 2018 RTP priorities to help align near-term investments to the updated long-range transportation plan.

For example, as part of the 2025-2027 Regional Flexible Fund Allocation (RFFA), safety, equity, climate change, mobility, and economic development served as the criteria for prioritization in the technical scoring. This example illustrates how the policy direction set forth in the development of the 2024-2027 MTIP were factored into and influenced the outcomes of funding decisions and consistency with the region's long-range transportation blueprint.

Metro worked closely with partners – ODOT, SMART, and TriMet – during the funding allocation processes to help ensure 2018 RTP consistency. Staff took opportunities to remind the agencies in committee and stakeholder settings to prioritize investments which are consistent with adopted regional policy. Metro staff also worked with partner staff in the background of the funding allocation process to help point out potential RTP consistency issues with proposed investments. For example, Metro staff identified whether candidate projects for funding were included in the 2018 RTP financially constrained project list or if candidate project scope descriptions were inconsistent with regional policy and needed further refinement.

Lastly, as part of the 2018 RTP consistency analysis, Metro completed a performance evaluation of an early draft of the 2024-2027 MTIP investment package to see how well the package of investments makes progress towards the 2018 RTP goals with an emphasis on the four priority areas. The 2024-2027 MTIP performance evaluation assists in understanding the near-term progress in RTP implementation and also highlights potential areas of improvement or focus for the next MTIP development cycle. As for the 2024-2027 MTIP performance evaluation, the results show very slight progress in of the four 2018 RTP policy priorities and several of the MAP-21 performance targets. However, there are opportunities for improvement in safety and accessibility. Consistent with national trends, the region continues to experience an increase in fatal and serious injury crashes and transit accessibility continues to recover from the pandemic and reassess a service strategy moving forward. Further details of the evaluation results can be found in Chapter 3.

## **Programming development**

As part of developing the programming tables for the 2024-2027 MTIP, partners ODOT, SMART, and TriMet were asked to provide a suite of project data to help develop the 2024-2027 MTIP. As part of the data request, partners were asked to provide the appropriate RTP identification number for each transportation investment – whether a project or program. For those projects or programs where partners were unable to supply an RTP identification number, Metro staff worked directly with the partner to determine whether the project is considered exempt from having a RTP identification number, aided the partner to find the identification number, or determined the project must wait to be programmed until the project is included in the 2023 RTP. Metro staff then verified the 2024-2027 MTIP investment matched in scope, general schedule, and costs to the RTP identification number provide. This exercise ensured projects and programs were consistent with the financial plan outlined in the 2018 RTP

and to the extent possible, the 2023 RTP.<sup>14</sup> The exercise also helped to define a next set of steps for the project or program to move forward if a verified RTP was not determined or where there were discrepancies in scope, general schedule, and costs.

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<sup>14</sup> The 2023 RTP update was in concurrently in process with the 2024-2027 MTIP development. However, the 2023 RTP scheduled adoption date is four months after (November 2023) the scheduled adoption of the 2024-2027 MTIP (July 2023).

## Congestion management process and MAP-21 performance measures

Traffic congestion occurs when the number of users on a transportation facility approaches or exceeds the capacity of that facility. Congestion has many causes, but mostly results from too much traffic for the physical capacity of a road to handle or periodic events like crashes, vehicle breakdowns, road work zones, storms and special events (e.g., parades, major sporting events). For drivers, congestion falls into two categories:

- Routine congestion – typically occurs daily during somewhat predictable timeframes
- Traffic incidents – unexpected situations and difficult to predict

At the outset, traffic congestion may appear as a negative outcome that needs to be eliminated. But congestion is an indicator of growth and economic vitality, as is the case in the greater Portland region. Transportation research demonstrates congestion cannot be eliminated, but needs active management in order to provide a reliable transportation system for users, better connect goods to market, and support travel across the region.

For the Portland metropolitan region, the efforts to address congestion focuses on improving reliability. Reliability is about predictability and dependability – being able to count on knowing about how long it will take to get to school, work or other activities. This form of active management is why the region’s transportation investments, as reflected in the 2024-2027 MTIP, primarily reflect investments that include expanding active transportation and transit options, ensuring a well-connected surface street network through complete streets projects, managing system demand through technology and operations, and implementing education, outreach, and marketing programs to encourage the use of travel options. These investments are represented in the 2024-2027 MTIP and demonstrates how the congestion management process serving as another guiding policy directive to building the near-term investment package.

As part of the development of the 2024-2027 MTIP investments, the congestion management process and approach was applied throughout the creation of the package of investments. The summary of the region’s approach to the congestion management process is as follows.<sup>15</sup>

- Monitor, measure and diagnose the causes of congestion on the regional transportation system;
- Evaluate and recommend cost-effective strategies to manage regional congestion; and
- Evaluate and monitor the performance of strategies implemented to manage congestion.

The region applied the congestion management process in both explicit and implicit ways. The congestion management process approach was another factor used to inform the development of the investment package. A short description of how the congestion management process was applied by each MTIP partner in the development of the 2024-2027 MTIP is provided in the following sections. Lastly, while discussed specifically in Chapter 3, the evaluation of the 2024-2027 MTIP and MAP-21 performance target reporting also serves as part of the analysis, recommendation and monitoring of the system in the overarching congestion management process for the entire set of investments in the 2024-2027 MTIP.

## Metro

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<sup>15</sup> More detail on the Portland metropolitan region’s Congestion Management Process approach can be found in Appendix L of the 2018 RTP.

Guided by the adopted 2018 RTP, the 2023 RTP update, new emerging regional policies, such as the regional mobility policy, and the regional transportation finance approach, the 2025-2027 Regional Flexible Fund Allocation was able to incorporate and define the role of the region's flexible funds in implementing regional policy directives, including and being informed by the congestion management process. The 2025-2027 RFFA is one investment tool to fund multiple implementation strategies to actively manage traffic congestion. The outcome of the 2025-2027 RFFA invested into a wide array of congestion management strategies outlined by the regional mobility policy and the congestion management approach outlined in the 2018 RTP.

The allocation of the Regional Flexible Funds is separated into two processes: Step 1 and Step 2. The Step 1 process focuses on region-wide investments, while Step 2 focuses on capital investments. For the 2025-2027 RFFA cycle, Step 1 allocated funds to support the regional planning, data management systems, and regional implementation programs. For example, the 2025-2027 RFFA Step 1 invested into programs like Regional Travel Options (RTO) and the Transportation System Management and Operations (TSMO). The RTO program carries out education, outreach, and marketing campaigns to support the reduction of single occupant vehicle trips while the TSMO program funds the regional traffic data collection system, PORTAL, and also funded the development of the ten-year regional transportation system management and operations strategy.

The funding decisions made in the Step 1 and Step 2 processes for the 2025-2027 RFFA were assisted and informed by data which addressed how the investment would make further progress towards the region's transportation priorities. For example, the candidate regional programs under consideration in Step 1 provided presentations to committees and decision-makers on their programs purpose and performance in contribution to meeting performance targets. The regional committees were able to see how the different candidate regional programs fit into the region's congestion management process as the programs are key strategies to reduce the need for costly and impactful expansion of motor vehicle capacity to provide for travel access needs. This investment decision to support these programs is itself part of the region's compliance with the congestion management process. These funds help ensure an adequate traffic data monitoring and analysis capacity is available for the congestion management process that informs transportation planning and spending decisions in the region by state, regional and local agencies.

As part of the Step 2 process, a competitive capital grant application process was undertaken. The 2025-2027 RFFA solicitation process provide data on existing conditions and structure its funding allocation process to encourage grant applications that recommend cost-effective strategies to manage congestion. Leaning heavily on the 2023 RTP existing conditions data as well as updated baseline data, information was made available to Step 2 funding applicants to help shape grant applications. The 2025-2027 RFFA Step 2 competitive grant allocation was more explicit in consideration of the congestion management process. In the application criteria, congestion management and mobility was part of the technical evaluation looking at the potential for the proposed project to manage demand on the system. The technical evaluation in conjunction with other elements, such as the public comment, helped to inform deliberations on which projects to propose for funding.

## ODOT

ODOT implements the congestion management process in several ways. In ODOT's role managing the freeway system for safety and efficient and reliable operations, Oregon Highway Plan Policy 1G.1 guides improvements. The policy prioritizes the preservation and improvement of existing system functionality over additional capacity or new facilities. Advancements in traffic data collection methods have enabled

ODOT to systematically collect, store, evaluate, and monitor traffic conditions on all its freeway corridors in the metro area. By monitoring key transportation performance indicators, ODOT can identify problems and effectively manage the system to better enable the movement of people, goods, and services.

In addition, the Oregon Transportation Commission's Strategic Action Plan (SAP) includes as one of its three priority areas building, maintaining and operating a modern, multimodal transportation system to serve all Oregonians, address climate change, and help Oregon communities and economies thrive. The priority area includes many goals and strategies which implements ODOT's Oregon Highway Plan policy 1G.1 by emphasizing the implementation of investments that focus on improving mobility for all users, investing in innovative technologies, and implementing a comprehensive congestion management plan to keep Oregonians and our economy moving, while also improving safety and preserving the existing system.

**Data Collection, Analysis, and Monitoring (on-going):** As part of ODOT's data collection and monitoring, the agency collects and evaluates data about existing congestion and publishes that data and an analysis of it in a bi-annual congestion report. The report looks at the following key traffic performance areas that relate to urban mobility:

- Congestion and bottlenecks
- Hours of congestion
- Vehicle hours of delay
- Travel time
- Speeds
- Recurring bottlenecks
- Reliability - AM, Mid-day, PM Safety
- Frequency of crashes and non-crash incidents
- Crashes and non-crash incidents by time of day and type

In addition, ODOT uses the region's travel demand model of forecasted future congestion to assess potential strategies to manage the system.

**Development of Cost Effective Strategies:** Consistent with the OHP 1.F hierarchy policy, ODOT considers demand and system management options to address congestion. In ODOT's approach to evaluating and applying cost effective strategies to manage system demand, ODOT looks at a diverse arrange of strategies including:

- Providing funding to demand management programs and Transportation System Management solutions such as ITS projects, traveler information systems, and incident response.
- Providing funding to complete facilities for walking, bicycling and transit access as a part of its capital projects.<sup>16</sup>
- Implementing ODOT Region 1 prioritized smaller-scale Congestion Bottleneck & Operations Study (CBOS) projects as a means to address congestion bottlenecks in the metropolitan area.
- ODOT Region 1 participating in the development of and/or funding of major transit capital projects in the region as a means of managing congestion in the region.

As a result of this application of the congestion management process, ODOT continues to implement cost-effective improvements that reduce crashes, delay, and relieve congestion at recurring bottlenecks

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<sup>16</sup> As mandated through state legislation to build facilities and dedicate revenues from gas taxes for active transportation.

on the freeway system. These are reflected in the 2024-2024 MTIP as individual projects or as part of Region 1 ODOT operations. Some examples include:

- The Interstate 5: Marquam Bridge to Capitol Highway project, to provide traveler information and support system operations on the Interstate 5 corridor.
- ODOT's Real-time strategy of active traffic management technologies, designed to improve safety and reliability by providing variable advisory speed, queue warning, and traveler information to manage congestion.
- The Transportation Management and Operations Center (TMOC) provides a single, regional point of contact for around-the-clock monitoring of transportation system operations and coordination of transportation related communications and services. TMOC specially trained personnel monitor freeway corridors and work in partnership with law enforcement, fire rescue and medical teams, and tow operators to provide safe and efficient traffic flow around an incident.

Traffic Incident Management (TIM) directly addresses traffic congestion and incident delay, and improves safety on the freeway system by deploying ODOT's Incident Response team to perform the functions of incident prevention, motorist assistance and incident management in specially equipped vehicles. Incident Response staff monitor freeways before, during and after peak commute periods removing hazards and abandoned vehicles from travel lanes, medians and shoulders. Responders also assist motorists and clear disabled vehicles from travel lanes.



*An ODOT Incident Response team performing functions to assist travelers and clear incidents from causing a significant backlog of congestion on the region's freeways.*

### **Congestion Management and Relief in**

**Development:** The Portland metro area has the most severe freeway system congestion in the state. Traffic congestion commonly occurs on Interstate 5 at the following: the Rose Quarter, Interstate Bridge, Terwilliger curves, Lower Boones/Tualatin-Sherwood Road and Interstate 205 at Airport Way.

House Bill 2017 – Keep Oregon Moving – is the statewide transportation package enacted by the Oregon legislature in 2017. As part of the \$5.3 billion package, the legislature directed ODOT to address and relieve congestion at key bottlenecks at: I-5 in the Rose Quarter area, OR 217 and I-205 at the Abernathy Bridge to Stafford Road. The legislature set aside funding from the package to implement the designed congestion relief projects. The OR217 project has been completed, while the remaining projects are currently under development, refining cost estimates, working through the environmental process, design, and developing construction packages and/or preparing right-of-way files.

The 2019 Legislature enacted the related House Bill 3055 providing additional funding capacity to the Phase I: I-205 Abernathy Bridge project and direction to pursue tolling on I-205 between the Bridge and Stafford Road interchange. The Phase I Abernathy Bridge project is underway and tolling of I-205 in this segment is being studied by ODOT.

In addition to specific projects funded by House Bill 2017, the Interstate Bridge Replacement (IBR) project was restarted by the State of Oregon and Washington in 2019. Originally planned and developed under the moniker Columbia River Crossing from 2004 to 2014, the project is to replace the aging Interstate

Bridge across the Columbia River with a modern, seismically resilient, multimodal structure that provides improved mobility for people, goods and services between Oregon and Washington. The Interstate Bridge Replacement is part of a ODOT's urban mobility office congestion management strategy.



*Project area for the Regional Mobility Pricing Project and I-205 Toll Project.*

Lastly, House Bill 2017 also directed ODOT to study and if viable, implement congestion pricing to address the congestion problem in Portland, particularly on Interstate 5 and 205. ODOT has begun the study process for congestion pricing of these facilities in the Metro region.<sup>17</sup>

Congestion pricing of I-5 and I-205 has been rebranded and reframed as the Regional Mobility Pricing Project (RMPP) and its scope expanded to look at tolling on all lanes of I-5 and I-205 in the Portland, Oregon metropolitan area. Tolls are being studied on I-5 between the Columbia River and the Boone Bridge in Wilsonville and on I-205 from the Columbia River to where I-205 intersects with I-5 in Tualatin, but remains in early stages. This factors into consideration the restarted Interstate Bridge Replacement project will contain a tolling component as part of the project. Whereas the I-205 Tolling project, as a separate project in part to support the financing of the I-205 Abernathy bridge replacement and widening project to Stafford Road, is nearer to completing the environmental analysis and design. But both tolling projects remain in early stages of development, namely in the environmental analysis.

While not prepared for programming in the 2024-2027 MTIP at this time, phases of these congestion relief projects are expected to be amended in the 2024-2027 MTIP. A listing of the prior obligated phases by project and illustrative programming, if known, can be found in Chapter 6.

## Transit agencies – SMART and TriMet

Investments in transportation made throughout the metropolitan region are crucial to managing congestion in our growing region. Specifically, transit investments are one of the most effective means to manage congestion and accommodate growth, connecting people with their community while easing traffic congestion and reducing air pollution.

### SMART

South Metro Area Regional Transit (SMART) is the city of Wilsonville's public transit department, serving residents since 1989. SMART has a fleet of 35 ranging from 40-foot buses to minivans and a trolley bus. SMART operates seven fixed-route services within the city and to Canby, Tualatin, and Salem. SMART also

<sup>17</sup> At this time, the tolling projects on I-5 and I-205 are not reflected in the 2024-2027 MTIP.



provides Dial-a-Ride (DAR) which provides door-to-door service within Wilsonville, non-emergency medical trips, and special shuttle services for older adults and people with disabilities.

In addition to being a public transit provider, SMART operates several transportation options programs that connect people to transportation choices, to reduce single occupancy vehicles trips, traffic congestion, and greenhouse gas emissions. SMART provides information and resources to help people learn about their travel options for all types of trips. The core components of SMART's transportation options program include:

- Emergency ride home program.
- Transportation fairs and lunchtime presentations – SMART hosts information tables to worksites of 100 employees or more to provide one-on-one assistance on transportation choices.
- Trip Reduction Plan (TRP) and survey design/analysis – an individualized plan per worksite, which aims to reduce single occupancy trips made to the worksite. SMART assists companies with guidance through the survey process, analyzing data and writing a successful TRP.
- Walk Smart/Bike Smart – Walk Smart is a free program that encourages participants to walk more and drive less for those short trips. Bike Smart is a one-stop shop for information about bicycling in and around the Wilsonville area. Wilsonville offers the use of free covered bike storage at the Wilsonville Transit Center.
- Individualized marketing campaigns – individualized marketing programs provide education and outreach efforts that encourage voluntary travel behavior change tailored to the travel needs of individuals.

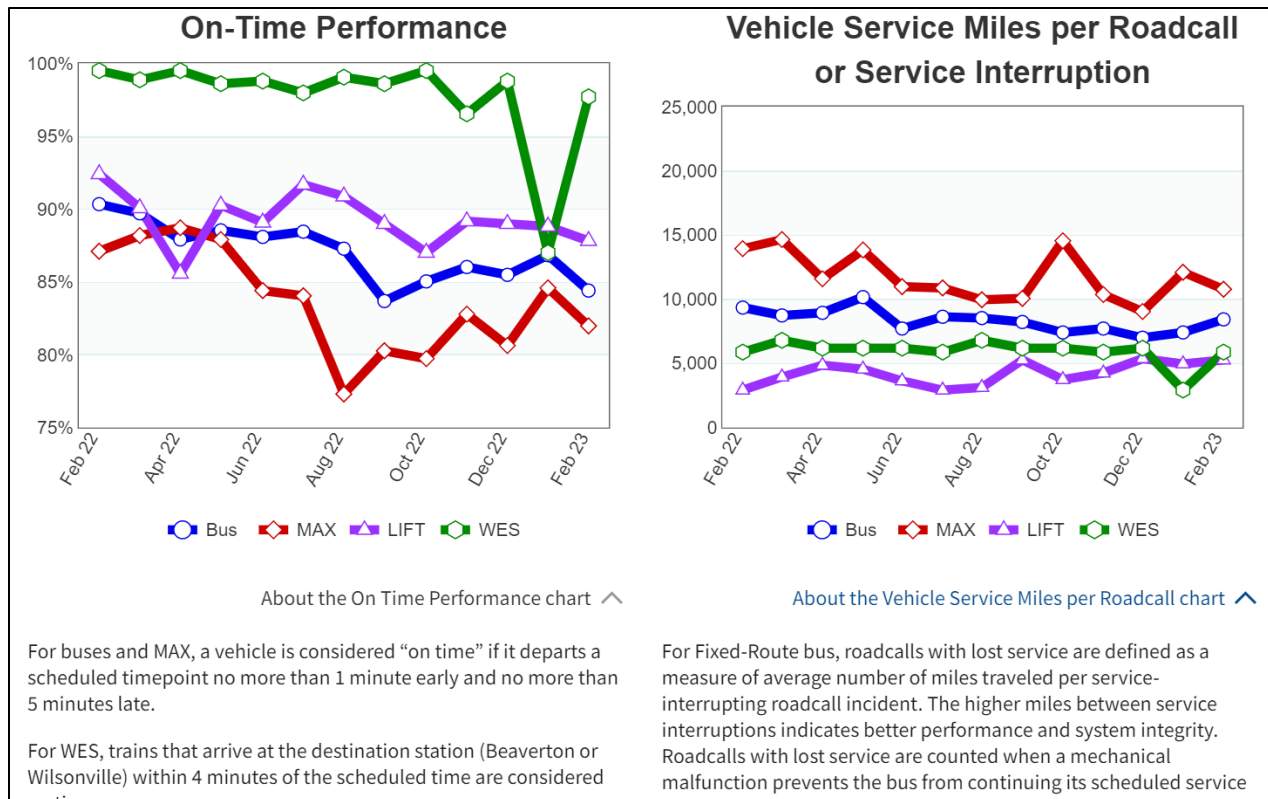
Additionally, through a collaboration between SMART and Ride Connection, RideWise Travel Training is available in Wilsonville for older adults (60+) and people with disabilities at no cost. Participants in the RideWise program receive access to information, public transportation training, and support centered on the safe, independent use of public transit.

SMART also works collaboratively with regional partners (including local jurisdictions, Metro, and ODOT) to carry out its functions in providing transit service efficiently and effectively.

## TriMet

As outlined in the 2018 RTP Appendix L, TriMet is a key partner in the region's congestion management process (CMP) to implement selected strategies that manage the transportation system. TriMet also contributes data related to transit ridership, revenue hours, and boarding rides per revenue hour, on-time performance measures, transit assets State of Good Repair, live vehicle tracking of bus, MAX light rail, and WES commuter rail arrival time and monitoring to help inform the region about the performance of the transit system and its ability to manage demand on roadways. Beyond TriMet's role as a public transit provider, the agency also administers transit pass programs for employers. The flexible commute options program works with interested employers to arrange a transportation program that supports healthy commute options such as transit, bicycling, walking and ridesharing as a benefit to their employees to support travel options and manage demand during the most congested times. In these roles and capacities, TriMet works collaboratively with regional partners (including local jurisdictions, Metro, and ODOT) to provide transit service efficiently and effectively, as demonstrated by enhanced transit collaborations.

**Figure 5-1. A sample of transit performance data collected by TriMet**



## Other federal regulations

In addition to addressing the requirements set forth in the Code of Federal Regulations related to the development of the transportation improvement program (TIP), the 2024-2027 MTIP also ensures compliance with other overarching federal rules. Explicitly, the 2024-2027 MTIP addresses the following regulations:

- Title II – Americans with Disabilities Act
- Title VI – Civil Rights & Environmental Justice
- Clean Air Act

A summary of how the 2024-2027 MTIP and its development process complied with the overarching federal regulations is described below. Further details can be found in Appendix III.

### Title II – Americans with Disabilities Act

The 2024-2027 MTIP investment program makes progress in complying with Title II of the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act that requires that no otherwise qualified individual with a disability be excluded from the participation in, be denied the benefits of, or be subjected to discrimination solely by reason of their disability. Building from the 2021-2024 MTIP cycle, the 2024-2027 MTIP continued to make more explicit the consideration of Americans with Disabilities Act within the investment program. For capital-oriented investments, as allocated through the regional flexible fund and the ODOT administered funding allocation programs, the consideration of ADA occurred in the project scoping and grant application processes. For example, in the 2025-2027 regional flexible fund application, a project readiness analysis was undertaken with each project application. With the

assistance of an outside transportation engineering consultant review, the applications were assessed to see whether proposed transportation investments incorporated the necessary scope elements, including Americans with Disabilities Act. In the ODOT administered funding allocation process, the funding proposals underwent a more significant project scoping exercise. During this process, missing scope elements were identified, and a review of proposed cost estimates was undertaken. Missing ADA elements or insufficient cost estimates for ADA were incorporated and refined to reflect the ADA in the proposed project.

Moreover, as part of ODOT's settlement agreement with the Association of Oregon Centers for Independent Living, ODOT continues to complete missing and update non-compliant ADA curb ramps on ODOT owned facilities. In the Portland metropolitan region over 8,000 curb ramps were identified in need by the inventory undertaken in 2017. ODOT continues to report annually on the progress on the curb ramp installation with the aim to have completed a little less than 12,000 by the end of 2027. As reflected in the MTIP, ODOT has investments focused on the design and construction of curb ramps on priority facilities and most project descriptions include ADA components.<sup>18</sup> As part of the settlement requirements, ODOT is to provide annual reports which outline ODOT's progress on the curb ramp improvements.

In addition, as the public transit service providers in the region, TriMet and SMART both operate programs that implement the Americans with Disabilities Act. While not explicit, the transit agencies' investment profile represented in the 2024-2027 MTIP includes capital and operating funds to address the Americans with Disabilities Act. TriMet and SMART's 2024-2027 MTIP investments include funds allocated through the Special Transportation Fund (STF) allocation as well other investments in bus purchases, including paratransit, and traveler education to support mobility services and paratransit for people with disabilities. In the most recent two-year STF allocation, TriMet, as the lead, awarded funding to activities including:

- TriMet paratransit LIFT services
- Wilsonville SMART medical transportation for the elderly and people with disabilities
- Ride Connection-operated services, including door-to-door rides
- Special service for seniors and persons with disabilities in rural area Sandy, Canby, and Molalla, and
- A range of services provided by Clackamas County Consortium for those with special needs.

The Coordinated Transportation Plan (CTP) for seniors and persons with disabilities guided the allocation of State Transportation Improvement Fund (STIF) that focus on State Special Transportation Formula (STF) Funds and federal Section 5310 grant programs.<sup>19</sup> The CTP is the central regional coordinating document for both federal and state funded transportation efforts serving people with disabilities and the elderly and describes the region's vision of a continuum of transportation services that takes into account an individual's abilities as they transition through various stages of age and/or disability. The CTP was updated in 2020 and continues to build upon the foundation of the 2016 CTP as well as the 2009 update, known as the Tri-County Elderly and Disabled Transportation Plan (EDTP).

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<sup>18</sup> More information on ODOT's accessibility efforts can be found at:  
<https://www.oregon.gov/odot/Engineering/Pages/Accessibility.aspx>

<sup>19</sup> The state Special Transportation Fund (STF) was consolidated with the State Transportation Improvement Fund (STIF) in July 2020, but preserved the intent of the STF program.

The Regional Flexible Fund Allocation process provided for local agency applications to identify whether candidate projects addressed implementation of their ADA Implementation Plans. Projects that identified such elements were then eligible to receive consideration of those elements in the Equity or Safety portions of their technical rating score that served as the basis for prioritizing projects for funding.

## **Title VI – Civil rights & environmental justice**

The Civil Rights Act of 1964, the Executive Order 12989 on Environmental Justice, and Executive Order 14008 the Justice 40 initiative, are federal laws, rules and executive direction to ensure programs and services delivered by the federal government or the agencies that receive federal money do not discriminate against or deny benefits on the basis of race, color or national origin (Title VI), conduct analysis and engagement to identify and address disproportionately high and adverse human health and environmental effects of federal or federally funded activities on minority populations and low-income populations (environmental justice), and set a goal that 40 percent of the overall benefits of certain Federal investments flow to disadvantaged communities that are marginalized, underserved, and overburdened by pollution.<sup>20</sup>

For the 2024-2027 MTIP, complying with Title VI of the Civil Rights Act and Executive Orders 12989 and 14008 means: 1) engaging with marginalized communities, particularly people of color, people with low incomes, and people with limited English proficiency; 2) conducting an analysis of the funding program to understand the effects of the investments for these marginalized communities; and 3) assessing the profile of the investment program in meeting the Justice 40 initiative. Therefore, as part of the development of the 2024-2027 MTIP, engagement was conducted throughout the building of the investment program and a performance analysis of investments was undertaken in the lead-up to the public review draft. Based on engagement activities undertaken and the results of the analysis, the 2024-2027 MTIP is in compliance with the requirements of Title VI of the Civil Rights Act and the Executive Order 12898 on Environmental Justice, but falls short on Executive Order 14008. A short discussion on engagement and the evaluation of the investments is provided in the following sections.<sup>21</sup>

## **Outreach and engagement**

As part of building the investment package for the 2024-2027 MTIP, each of the MTIP partners undertook a process to allocate federal and matching locals funds to projects and programs that serve the regional transportation system. Each agency conducted public involvement, outreach, and engagement activities to gather feedback and input from marginalized communities and other affected stakeholders. The level of public involvement, outreach, and engagement is scaled and tailored for each funding allocation process according to policy direction and agency public participation procedures as outlined in their public participation plan or agency guidelines. Engagement tools most frequently used include public comment periods, virtual public hearings, outreach through various social media, community forums, workshops, and web surveys. The public involvement processes for the funding allocations, in addition to providing opportunity to comment on investments that eventually comprise the 2024-2027 MTIP, also served as opportunities to continue relationship building with marginalized communities.

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<sup>20</sup> Under Title VI, people not proficient in English are entitled to assistance to access critical information.

<sup>21</sup> Further discussions about the public involvement and engagement for the funding allocations undertaken by each MTIP partner can be found in Chapter 4 of this document. Additional information about the 2024-2027 MTIP performance assessment and the transportation equity evaluation can be found in Chapter 3 of this document and Appendix I.

Further description about the public involvement process deployed for each MTIP partner's funding allocation process can be found in Chapter 4 of this document.

## Transportation equity evaluation

Marginalized communities identified three transportation system outcome areas of greatest importance: safety, accessibility and affordability.<sup>22</sup> In taking direction and building from the 2018 RTP, the evaluation of the 2024-2027 MTIP investment package examined how the investments address the outcomes identified of greatest importance to marginalized communities. As a result, the 2024-2027 MTIP performance evaluation did a comparison analysis as to how the following metrics perform in areas with a high concentration of marginalized communities – called equity focus areas – compared to those areas with lesser concentrations of historically marginalized communities – called non-equity focus areas. The 2024-2027 MTIP transportation equity evaluation is made up of a subset of the performance measures that reflect the priorities of marginalized communities, and analysis of how the investment programs performed in these areas. The included performance measures are:

- Level of investment in safety
- System completion of the active transportation network
- Access to jobs and community places within a timely commute, specifically by transit

In summation, the results of the 2024-2027 MTIP transportation equity evaluation illustrated the following:

Level of investment in safety – Of the total 2024-2027 MTIP safety investments, a significant portion is being focused into equity focus areas and addressing the roadway facilities with high number of crashes within marginalized communities. A safety investment is defined as projects that prioritize safety countermeasures proven to reduce crash risk and targeted to known crash risk areas. The level of safety investment is in response to the trend over the past five years of the increased number of crashes on the region's roadways.<sup>23</sup> Despite the crash trends and the level overall investment in 2024-2027 MTIP dedicated towards safety being less than previous cycles, the focus on transportation safety in marginalized communities is a positive response.

System completion of the active transportation network – The 2024-2027 MTIP investments make progress to complete the gaps in the active transportation network, particularly in equity focus areas. With the 2024-2027 MTIP investments, the greatest amount of active transportation network completion at 75 percent are in equity focus areas near frequent service transit stops and stations. In general, active transportation system completion tends to be greater overall and higher in equity focus areas compared to non-equity focus areas. Nonetheless, the rate of active transportation network system completion with the 2024-2027 MTIP investment package is similar in equity focus areas and non-equity focus areas and the rate of increase to system completeness tends to be minor, at one percent.

Access to jobs and community places in a timely commute – The 2024-2027 MTIP investments very slightly increases access to jobs and community places for those using transit in equity focus areas at a greater number than non-equity focus areas or the accessibility remained unchanged. The accessibility

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<sup>22</sup> Due to resource and capacity constraints, the pilot launch of the combined housing and transportation expenditure tool for the purposes of evaluating affordability was not deployed with the 2021-2024 MTIP evaluation as originally proposed for the technical evaluation.

<sup>23</sup> Represents observed crashes and trend over a five year rolling average starting with a 2011-2015 baseline and the most recent representing 2016-2020 crash data.

can vary by sub-region, where the access to the number of jobs or community places reduces due to changes in transit service, but even then decrease in the number of jobs or community places tends to be greater in non-equity focus areas compared to equity focus areas, meaning transit service is being preserved as much as possible to support marginalized communities. The one exception where the pattern is unclear is in Clackamas County. However, overall access to jobs and community places by transit is being preserved as best as possible or supported to grow to serve marginalized communities as transit agencies work to recover from the pandemic.

The results of the 2024-2027 MTIP transportation equity evaluation show the region's investments do not have a disproportionate or disparate impact for people of color, people with low incomes, and people with limited English proficiency. Nonetheless, the performance assessment demonstrated areas of improvement needed to bridge the gaps and to better serve marginalized communities' transportation needs.

More detail on the analysis of the 2024-2027 MTIP investment program can be found in Chapter 3 of this document.

## **Clean Air Act**

In 1991 Congress passed the Intermodal Surface Transportation Efficiency Act (ISTEA), making dramatic changes to the federal transportation funding program to states and metropolitan planning organizations. A hallmark of ISTEA was its extension of transportation serving other goals beyond the traditional aims of safety and mobility. Occurring in a similar timeframe as the Clean Air Act Amendments of 1990, the new transportation reauthorization bill explicitly acknowledged the role of automobile travel in undesirable environmental impacts, particularly to air quality. As a result, ISTEA established the linkage between the Clean Air Act and the transportation sector, where areas designated as having air pollution levels beyond national standards must demonstrate how transportation investments would reduce air pollution and/or not worsen already poor air quality.

The Portland metropolitan region was designated as a poor air quality region in the 1990s and as a result the Oregon Department of Environmental Quality developed federally required air pollution reduction plans to get the region back on track. Metro, and more broadly regional partners, played a significant role in the development and implementation of air pollution reduction plans. As part of the commitment, the region needed to demonstrate transportation plans and investments would not exceed regionally specific thresholds for emissions of certain air pollutants and would implement any defined transportation control measures (TCMs) or contingency plans.

In October 2017, the region completed its maintenance plan commitments, demonstrating the region's plans and investments do not exceed the region's air pollution thresholds. In completing its commitments, the U.S. Environmental Protection Agency (EPA) provided Metro, as the MPO for the Portland region, a letter confirming the region had completed its requirements, and that the analysis to demonstrate plans and investments would not exceed thresholds was no longer necessary. (See Appendix IV)

In addition, the region successfully completed its transportation control measures with the development and implementation of the 2018-2021 MTIP. The region committed to three TCMs to be completed from 2007-2017: 1) increase transit service; 2) build bicycle infrastructure; and 3) build pedestrian infrastructure in employment and population centers. With the investments allocated as part of the

development of the 2018-2021 MTIP, the TCMs were completed.<sup>24</sup> Metro continues to track and monitor the implementation of those projects identified as TCMs in the 2018-2021 MTIP until the completion of these projects.<sup>25</sup>

The region's 2024-2027 MTIP is in compliance with the Clean Air Act. The region completed the implementation of TCMs and received confirmation that the region no longer needs to demonstrate planned or programmed investments will not exceed emission thresholds for federally regulated pollutants. The region remains committed and continues to comply with all other elements of the State Implementation Plan (SIP). As part of the region's SIP obligations, the region continues to monitor vehicle miles traveled annually, and commits to enact air pollution reduction contingency measures if the region's vehicle miles traveled rise above a certain threshold.

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<sup>24</sup> The development of the 2018-2021 MTIP took place between 2015 through 2017.

<sup>25</sup> As of March 2023 six projects identified as TCMs remain active in implementation and currently reflected in the 2024-2027 MTIP.





## CHAPTER 6: MTIP PROGRAMMING

### Programming of Projects

Programming of funds refers to the assignment of transportation investments by project phase (planning, project development, final design, right-of-way and construction) to the types of federal funds and expected years of expenditure. Metro works in cooperation with all of the region's transportation agencies to select which transportation priority investments will be funded with federal transportation discretionary funds. To manage equitable access to federal funds, Metro staff coordinates with sponsoring agencies to determine the expected timing of project phases and seeks to schedule expected revenue to planned work phases in each year of the program. The goal is to assure that all federally funded projects are able to advance in a timely, logical fashion.

The transit agencies base their programming of funds in the MTIP using the annual Adopted Budget for the upcoming year programming and the annual Financial Forecast for multi-year programming. The federal transportation reauthorization plays a significant role in the financial forecast to develop multi-year programming. With the adoption of the Bipartisan Infrastructure Law in 2021, the transit agencies forecast an increase of 3% annually under the transit formula program funding authorization levels established by the Act throughout the legislation's final year and future years thereafter for the purposes of multi-year programming.

For Metro, and specifically for the projects and programs awarded regional flexible funds, which is using a six-year programming framework, this involves transportation funding being split into different fiscal years with preliminary engineering in years one and two, right-of-way acquisition in years three and four and construction in years five and six as a typical programming approach.<sup>26</sup> It is very rare that a project can execute more than one phase of work in a single year.

Balancing project expenditures with annual revenue limits becomes more difficult when a single project requires a large sum to complete one or more phases of work in one year. A project that requires more

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<sup>26</sup> ODOT and TriMet continue to use a four-year programming framework and as a result, the funding being split into different fiscal year by phase is condensed.



than \$5 to \$6 million can make it difficult for other more modest projects to proceed in a given year. The volume of project work that can proceed in any one year must fall within the revenue that is available that year, including conditional access to statewide resources. (See fiscal constraint discussion in Chapter 5.)

The regional flexible funds are awarded by Metro to a lead agency, which then contracts with ODOT to obtain access to the funds. The lead agencies are ultimately responsible for the operation and maintenance of newly constructed facilities.

ODOT's process for scheduling and programming projects in the MTIP and STIP varies depending on the project delivery method. For ODOT delivered projects, the draft list of scoped projects included in the STIP are given to the region project delivery team so they can analyze the list with ongoing and planned projects. Schedules are determined to identify efficiencies, distribute funds and workloads as evenly as possible, and to avoid negative impacts to the travelling public in construction. For local agency delivered projects, ODOT reviews and accepts the local agency determined schedule for programming in the MTIP and STIP. The ODOT STIP is on a four year cycle, so if funding is programmed in the MTIP beyond the fourth year of the STIP, it simply will not show those funds until the next STIP is developed.

Included as part of Attachment 6.1 are the programming for projects scheduled to receive federal funds in the Portland Metropolitan region during federal fiscal years 2024-2027.<sup>27</sup> The transportation investments are organized by lead agency and are in alphabetical order.

The following table describes the frequently used terms in the MTIP programming tables.

**Table 6-1. Frequently used terms in the 2024-2027 MTIP programming tables**

Term	Definition
<b>ODOT Key Number</b>	This is a unique identification number assigned to a program or a project by the ODOT to organize all transportation projects within the State Transportation Improvement Program (STIP).
<b>MTIP ID</b>	This is a unique identification number assigned to a program or project by the MPO (Metro) to organize all transportation projects within the Metropolitan Transportation Improvement Program (MTIP).
<b>RTP ID</b>	This is a unique identification number assigned to a program or project by the MPO (Metro) to organize all transportation projects within the long range Regional Transportation Plan.
<b>Project Name</b>	The name of each project, which typically indicates the project location.
<b>Project Type</b>	This indicates the primary travel mode(s) the project will serve.
<b>Lead Agency</b>	The agency that is contractually responsible for managing and delivering the project.
<b>Phase</b>	The type of work being completed on the project. Includes: <b>Planning:</b> activities associated with preparing for projects for implementation, from broad systems planning to project development activities. <b>Preliminary engineering:</b> work to create construction and environmental documents. <b>Right of way:</b> activities associated with investigating needs for use of land for the construction or operation of a project.

<sup>27</sup> With the exception of those projects awarded 2025-2027 regional flexible funds, where programming is shown through federal fiscal year 2029 as described in Chapter 5.

	<b>Construction:</b> activities associated with the physical construction of a project. <b>Other:</b> Activities for programs or projects not defined by one of the other phase activities defined above.
<b>Year</b>	The programming year is the federal fiscal year funds are expected to be available for the project. The federal fiscal year begins October 1st of the year prior to the identified year (FFY 2024 is October 1, 2023 through September 30, 2024).
<b>Fund Type</b>	Description of the federal, state or local funds assigned to a project phase. See the List of Acronyms for more information on individual fund types.
<b>Federal Amount</b>	Federal funding authority made available to a project to reimburse eligible project related expenses.
<b>Minimum Local Match</b>	Funding required to be provided by the lead agency to qualify for the federal funding authority programmed to the project.
<b>Other Amount</b>	Additional funding from non-federal sources identified as available to the project.
<b>Total Amount</b>	The amount of funding programmed as available to the project within the timeframe of the 2024-2027 Metropolitan Transportation Improvement Program.
<b>Estimated Total Project Cost</b>	This includes cost of the project spent prior to 2024 and costs that may be necessary to complete the project after 2027.
<b>YOES</b>	All funds programmed in the FY24-27 MTIP are represented in year of expenditure (YOE) dollars.

## Prior Obligations

Since the enactment of House Bill 2017 by the Oregon legislature in July 2017, the Portland metropolitan region has several large scale infrastructure projects actively in development. These large scale projects have a high public profile and communicate to the public regularly progress on project development and activities. Prior practice for programming of funds to projects has been to not program a project phase in a new MTIP if the scheduled funding for that phase has already obligated as the programming was no longer needed for the federal purpose of confirming availability of the programmed funds prior to federal commitment (obligation) of those funds to the project. This practice, however, can create confusion for members of the public and decision-makers because an active major project appears to “disappear” when transitioning from one MTIP to the next in circumstances where a new or subsequent phase is not ready to program. The standard practice also creates confusion at the regional advisory committees when MTIP amendments are needed for those projects which did not transition from one MTIP to the next.

Allowed per the code of federal regulations, the 2024-2027 MTIP has changed the standard practice by providing a listing of major projects in the region that have already obligated funding for a project phase, other than a planning phase, and may need to obligate additional project funding during the active timeframe of the 2024-2027 MTIP. The purpose of including prior obligated project information for major projects are to:

- clearly document and demonstrate a project that is active and allow administrative adjustments to prior obligated programming without question about whether the new programming represents a “new” project to the 2024-2027 MTIP
- Track and monitor the programming activity in the lead up to any formal amendment to program a future project phase

- provide transparency regarding the active status of projects for public and stakeholder awareness

The approach to list prior obligations only applies to major projects in the Portland region. A summary of the prior obligations for the active major projects is below and further details on the obligations for each project can be found in Appendix IV. The following projects will continue to be expected to meet the requirements for administration of the 2024-2027 MTIP.

**Table 6-2. Prior Obligations of Major Projects in the Portland Region**

Lead Agency	Project Name	Prior Obligated Phase & Initial Obligation Year	Total Amount Prior Obligated
ODOT	Interstate Bridge Replacement	Planning – 2020	\$9 M
		Preliminary Engineering - 2022	\$81 M
ODOT	I-5 Rose Quarter	Preliminary Engineering - 2016	\$71.4 M
		Right-of-Way - 2020	\$58 M
ODOT	I-205 Abernathy Bridge	Other - 2022	\$350 K
		Construction - 2022	\$375.3 M
ODOT	I-205 Widening	Planning – 2016	\$15 M
		Preliminary Engineering - 2018	\$30 M
		Right-of-Way - 2019	\$2.5 M
ODOT	I-205 Tolling	Preliminary Engineering - 2022	\$27.3 M
ODOT	OR217 Widening and Auxiliary Lanes	Preliminary Engineering - 2019	\$22.5 M
		Other - 2019	\$1.6 M
		Right-of-Way - 2020	\$3 M
		Construction - 2021	\$131.7 M
TriMet	MAX Red Line Extension	Other - 2020	\$10.5 M
		Preliminary Engineering – 2021	\$18.2 M
		Right-of-Way – 2021	\$5.2 M
		Construction - 2022	\$181.1 M
City of Portland	82 <sup>nd</sup> Avenue – Jurisdictional Transfer	Other - 2022	\$80 M
Multnomah County	Earthquake Ready Burnside Bridge	Preliminary Engineering - 2023	\$123.3 M

## Illustrative Projects

In addition to the new practice of including prior obligations for major projects, a new practice to the 2024-2027 MTIP is to provide a separate listing of illustrative programming for select active major

projects. Intended for the purpose of transparency, the lead agency of major projects voluntarily provided information about projects or project phases they expect to request for inclusion in the 2024-2027 MTIP at a future date. Not all active major projects are identified in the illustrative programming listing.

**Table 6-3. Illustrative Programming for Select Major Projects in the Portland Region**

Lead Agency	Project Name	Illustrative Project Phase & Year	Preliminary Estimate of Project Phase Cost
ODOT	I-205 Widening	Construction – 2024	\$315 M
ODOT	I-205 Tolling	Right-of-Way – 2024	\$500 K
		Utility Relocation – 2024	\$500 K
		Other – 2024	\$500 K
		Construction – 2024	\$55.5 M
ODOT	Regional Mobility Pricing Project	Preliminary Engineering – 2024	\$56.8 M
		Utility Relocation – 2024	\$10 M
		Other – 2024	\$10 M
		Right-of-Way – 2024	\$10 M
		Construction – 2025	\$111.5 M
Multnomah County	Earthquake Ready Burnside Bridge	Utility Relocation	\$3 M
		Construction – 2025	\$767 M



## CHAPTER 7: ADOPTION OF THE 2024-2027 MTIP AND INTEGRATION WITH THE STIP

### Public comment and the process for the disposition of public comments

As part of developing and finalizing the adoption draft of the 2024-2027 MTIP, a public comment period will take place from Wednesday, April 5, 2023 to Friday, May 5, 2023. During the public comment period a public review draft of the 2024-2027 MTIP is made available for comment. An electronic version of the 2024-2027 MTIP public review draft is available for download on Metro's website. A public hearing will take place on April 20, 2023 at the Metro Council meeting. Invitation to comments are further solicited through various communications to community and civic networks. A request for comment and offer for a consultation meeting was made to resource agencies and tribes. Furthermore, newspaper advertisements were published to encourage comment and notify members of the public of the comment opportunity.

In efforts to encourage participation and not have the length and detail of the MTIP document serve as a barrier, a public comment survey requesting feedback and comment was created as part of the public comment and made available on Metro's website. The survey focuses on communicating a summary of the 2024-2027 MTIP and the results of the performance evaluation. The survey asks respondents to select on a rating on a one (1) to five (5) scale how well the 2024-2027 MTIP is doing towards achieving outcomes related to equity, safety, climate change, and mobility. In addition, the survey left open ended responses to allow survey respondents to elaborate further or address other topics.

#### Chapter sections

- Public comment and the process for the disposition of public comments
- Public comment major themes and responses
- Adoption and finalizing the 2024-2027 MTIP

Upon the completion of the public comment period, the comments received through the survey, public hearing, written submissions, email submissions, voicemail/telephone submissions, consultation and other comments received are synthesized into major comment themes. The major themes from public comment will be provided to MTIP partners – ODOT, SMART, and TriMet.

Project specific comments are also sent to the implementing agency of the project. Depending on the nature of the comment, the implementing agencies may be asked to provide responses to some comments formally to record as part of the public comment report of the 2024-2027 MTIP. For the remainder of the project specific comments, the implementing agencies were asked to receive the comments.

A public comment report will be developed and included as an appendix to the 2024-2027 MTIP. The public comment report is part of the appendix package for the adoption draft of the 2024-2027 MTIP and will be brought forward to the technical and policy advisory committees throughout the adoption process. A description of the adoption process can be found in this chapter.

## **Public comment major themes and responses**

The following section to be completed after the 2024-2027 MTIP public comment period has taken place.

## **Adopting and finalizing the 2024-2027 MTIP**

The adoption process for the 2024-2027 MTIP will begin in June 2023 with requests to TPAC, JPACT, and Metro Council to approve and adopt of the 2024-2027 MTIP.

Upon adoption by the Metro Council, the 2024-2027 MTIP is submitted to the Governor of Oregon for final approval. With approval by the Governor, the programming of projects from the MTIP is incorporated without change into the 2024-2027 State Transportation Improvement Program administered by the Oregon Department of Transportation (ODOT). Metro completes the adoption and submission of the MTIP for inclusion in the STIP during the summer prior to start of the first federal fiscal year for the new MTIP. For the 2024-2027 MTIP, this will take place in summer 2023.

Once the 2024-2027 STIP has included the MTIPs from all the Oregon metropolitan planning organizations (MPOs), the fully packaged 2024-2027 STIP is then submitted to Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) for approval. The STIP is submitted to federal agencies in late summer or early autumn prior to the start of the first federal fiscal year for the new STIP and MTIPs. For the 2024-2027 STIP, the submission is scheduled for late summer 2023.

Once federal partners approve the 2024-2027 STIP, a letter is transmitted to ODOT with copies to all the Oregon MPOs and transit agencies, confirming approval as well as any further actions that need to be taken. Upon federal approval of the STIP the 2024-2027 MTIP becomes the effective MTIP and supersedes the 2021-2024 MTIP.





## CHAPTER 8: ADMINISTERING THE 2024-2027 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP)

This chapter describes the approach to managing proposed changes to the 2021-2024 MTIP. Changes to the 2021-2024 MTIP are regulated by the Code of Federal Regulations (23 CFR 450.326) and additional guidance may be provided by regional offices of the Federal Highway Administration (FHWA) and the Federal Transit Administration (FTA). This chapter describes Metro's policies and approach to implementing those federal regulations and guidance as the Portland metropolitan area metropolitan planning organization (MPO).

### Background: The Need for MTIP Changes

The federal transportation project delivery process involves numerous approval steps. If a project is federally funded, or considered a regionally significant, the project is required to be included in the MTIP and STIP, reflected through the programming. MTIP programming presents the project with its proposed improvements, summary of major scope elements, identifies how the project will expend its committed federal funds by specific phase, and the delivery timing summary to complete each project phase. The MTIP is as a four-year snapshot of how available funds are proposed to be spent and the approved Regional Transportation Plan (RTP) will be implemented. Additionally, the MTIP is used as part of the obligation verification process, and as part of the required federal approval process.

Due to the complexity of the federal transportation delivery process, most projects require changes in how they are programmed in the MTIP and subsequently the STIP as they progress through the development and delivery process. Changes are often necessary to complete federal requirements, such as the National Environmental Policy Act (NEPA), or obligate federal funds with a specific project phase, or obtain their next required federal approval step. Examples of project changes that may require adjustments to the MTIP include:

- Lead agency and the project name
- Description and approved scope of work
- Approved limits, milepost references, and/or cross street limits

- Changes to needed funding
- Timing of the obligation of funds
- Delivery timing changes and expected completion date
- Combining existing projects or splitting a project in multiple projects
- Adding a new project
- Cancelling a project

## Objectives of the MTIP Change Management Process

Proposed changes to the MTIP will be managed with the following objectives:

- Ensure that federal requirements are properly met for use of available federal funds.
- Ensure consideration of proposed amendments on progress toward regional policies and system performance targets for use of limited available resources.
- Provide opportunity for consideration of proposed amendments on other jurisdictions or transportation assets or services provided by other agencies in the region.
- Ensure that the responsibilities for project management and cost control remain with the agency sponsoring the project.
- Ensure routine amendments to the MTIP to proceed expeditiously to avoid unnecessary delays and committee activity.
- Provide for dealing with emergency situations.
- Ensure projects are progressing to fully obligate programmed funding in order to avoid a lapse of funds.

## Classification of Changes to the MTIP

There are two types of changes to the MTIP: formal amendments and administrative modifications. The Oregon Division of the Federal Highway Administration (FHWA), the Federal Transit Administration (FTA) Region 10, and the Oregon Department of Transportation (ODOT) developed an amendment matrix to further describe distinctions between formal amendments and administrative modifications. Metro follows the amendment matrix when evaluating and processing requests for project changes in the MTIP to determine whether the change are administrative modifications or amendments. The Amendment Matrix (Table 8-1) provides the summary of allowable changes that qualify as formal amendments or as administrative modifications. This matrix and the specific procedures to implement it may be updated as necessary and the most current update is included in the MTIP Change Management Procedures Manual included as part of the appendices.

**Table 8-1: ODOT-FHWA-FTA Amendment Matrix**

Item	Formal-Full MTIP Amendments
1	JPACT & METRO COUNCIL AUTHORIZED DISCRETION:



	Metro JPACT and Council reserved the right to require any project change to be process as a formal/full amendment based on the scope or cost change, regional significance impact, impact to air quality, change in relationship to the RTP and the RTP's goals and strategies, and/or public interest or public sensitivity to the project or change.
2	<b>ADDING OR CANCELING PROJECTS:</b> Adding/cancelling a federally funded, regionally significant, or state/locally funded project or project phase which will potentially be federalized triggers the need for a formal amendment. If a project or project phase does not meet these criteria, see Administrative Modification #1. For Western Federal Lands (WFL) or planning projects, see administrative section #11.
3	<b>PROJECT LOCATIONS AND/OR MILEPOST LIMITS CHANGES:</b> Location/Limit Changes that normally will trigger a formal amendment: <ul style="list-style-type: none"> <li>- Project location and limit changes equal to or &gt; 1 mile = Formal/Full Amendment</li> <li>- Project modifications that result in NEPA re-evaluation</li> <li>- Change affects air quality conformity</li> <li>- Adding capacity per the Federal Code of Regulations (CFR) and FHWA/FTA/EPA guidance</li> <li>- Projects adding work-type in the STIP FP that trigger a change in limits, location, or result in a significant scope impact</li> <li>- Project location or limit changes greater than 0.5 miles and up to 1 mile = MPO discretionary review and consideration of the change impact</li> </ul> Project location or limit changes up to 0.5 miles = Administrative modification if the discretionary review result in no significant impact as noted below. If significant impacts are noted, Metro will process the change as a formal amendment.
4	<b>CHANGES IN FISCAL CONSTRAINT (COST CHANGES) BY THE FOLLOWING CRITERIA:</b> Changes in Fiscal Constraint by the following criteria will normally trigger a formal amendment: <ol style="list-style-type: none"> <li>For FHWA funded projects - total project cost increase for all phases and any type of funding increase: <ul style="list-style-type: none"> <li>- Projects under \$1M – cost increases over 50%</li> <li>- Projects between \$1 million to \$5 million – cost increases over 30%</li> <li>- Projects over \$5 million – cost increases over 20%</li> </ul> </li> </ol> For FTA funded projects – total project cost increases for all phases and any type of funding increase over 30% will trigger a formal amendment.
5	<b>MAJOR PROJECT SCOPE OR WORK ELEMENT ADJUSTMENTS:</b> Major changes to the project scope or work approved work elements will normally require the changes to occur through a formal/full amendment The changes are allowable as a formal amendment assuming: <ul style="list-style-type: none"> <li>- The changes are not capacity enhancing which would change the project transportation demand modeling status.</li> </ul>

	<ul style="list-style-type: none"> <li>- The project is still consistent with the RTP in overall scope, improvement, performance, strategies, and goals from the original constrained RTP project entry</li> <li>- The scope adjustments do not impact the project's cost, location, or limits beyond the established thresholds described above.</li> <li>- The scope changes include capacity enhancing additions but are still consistent with project as modeled in the RTP.</li> <li>- The proposed scoping changes result in a significant down-scoping action to the project but are still consistent with the original Metro RFFA award, and have been approved by Metro management and/or JPACT previously.</li> </ul>
6	<b>ADDING PERMANENT EMERGENCY RELIEF PROJECTS</b> Adding an emergency relief permanent repair project that involves substantial change in function and location will normally trigger the need for a formal/full amendment.
<b>Item</b>	<b>Administrative Modifications</b>
1	Any project changes that do not meet the MTIP amendment criteria in the Full Amendments section above.
2	Advancing or slipping an approved project/phase within the current MTIP constrained years (years 1-4)
3	Adding or canceling any phase of an approved existing project in the active MTIP constrained years except for the Construction phase. Adding or canceling the construction phase for a project usually will trigger the need for a formal/full amendment.
4	Combining two or more approved existing projects into one or splitting an approved project into two or more projects or splitting part of an approved project to a new one.
5	Completing Minor technical corrections to make the printed STIP consistent with prior approvals, such as typos or missing data.
6	Completing Project Cost Decreases: This assumes the cost reduction is not due to a significant location or limits change as well as a scope change.
7	Completing Minor Scope Changes: Project adjustments that result from minor scope changes can occur as an administrative modification under the following conditions: <ul style="list-style-type: none"> <li>- The changes to the project costs remain under the formal amendment cost threshold.</li> <li>- The changes to the project limits and location remain under the formal amendment threshold.</li> <li>- The changes are non-capacity, air quality exempt changes which include examples listed in 40 CFR 93.126, Table 2 and 40 CFR 93.127, Table 3</li> <li>- The changes result in the project still being consistent with the RTP through fiscal constraint, performance assessment, goals, and strategies verifications.</li> </ul>

	For Metro RFFA funded projects, the project is still consistent with the original RFFA award in scope, location, and limits
8	Adjusting programming or obligation levels to prior obligated projects without phases in the active years of the current MTIP. The following conditions apply: <ul style="list-style-type: none"> <li>- The prior obligate phase is being updated for follow-on obligation purposes.</li> <li>- Fund swaps or adjustments are occurring to the prior obligated phase based on obligation updates to the project.</li> </ul> No change in scope, location/limits results from the prior obligated phase adjustment.
9	Completing project name or description change based on minor scope, location, or limits changes. Assumptions: The name or description change is considered corrective in nature and does not reflect a major change to the project
10	Modifying metropolitan planning projects (UPWP) funded under 23 U.S.C. 104(d) and 49 CFR 5305(d) or State Planning and Research (SPR) projects funded under 23 U.S.C. 505 and 49 U.S.C. 5303(e) funds.

To process the proposed project changes, Metro staff works with the project lead agency staff to collect project related information. The information is to understand the effect of the proposed change, if any, on the following:

- consistency with the adopted policies, goals, strategies, and financially constrained project list of the adopted Regional Transportation Plan (RTP),
- consistency with the project description and scope identified in the RTP,
- consistency with the Metro regional travel demand model project inputs for motor vehicle, transit, freight, and bicycle facilities,
- the timely implementation of Transportation Control Measures (TCMs) and other requirements of the State Implementation Plan (SIP) for air quality,
- funding adjustment impacts to the financial constraint finding,
- progress toward achieving regionally adopted performance targets.

## Description of Approval Process for Project Changes in the MTIP

When project changes are necessary, they are required to be reflected in both the MTIP and STIP. This action requires a coordinated effort among the Lead Agency, Metro, ODOT Region 1, ODOT Headquarters, and the US Department of Transportation (USDOT).

Formal amendments and administrative modifications each have a similar development process, but their approval steps differ. The approval of administrative modifications is delegated to the Metro MTIP Program Manager. Once the Metro MTIP Program Manager approves the administrative modification, it may be added into the current approved MTIP. The State STIP Program Manager approves administrative modification for STIP inclusion. There are no required U.S. DOT approval steps for administrative modifications.

For formal amendments, the Metro approval process includes:

- a public notification and comment process,
- a recommendation from Metro’s Transportation Policy Alternatives Committee (TPAC),
- approval action by the Joint Policy Advisory Committee on Transportation (JPACT), and
- final approval from the Metro Council.

Once approved by Metro, all formal amendments are sent to the ODOT Region 1 STIP Coordinator to initiate the final STIP review and approval process by U.S. DOT. A final review and approval of formal amendments by the State STIP Coordinator and final U.S. DOT approval occurs before the proposed project changes are included into the MTIP and STIP.

## **MTIP Change Management Procedures Manual**

The specific procedures to receive, consider and process MTIP project change requests are documented in the MTIP Change Management Procedures Manual. This manual is available on the Metro website or by request to the Metro. The version current as of May 2023 is included as Appendix VI to this MTIP.

These procedures may be updated by Metro staff as needed to respond to the circumstances presented by individual change requests or changes to federal regulations and guidance.



If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

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**Auditor**

Brian Evans

600 NE Grand Ave.  
Portland, OR 97232-2736  
503-797-1700